

HUMAN DEVELOPMENT

Volume 34 : Number One : Spring 2013



MISSION VS. MARGIN

A Diocesan Pastoral Planning Process

Perspectives on Catholic Health Care

Striking a Balance in Catholic Universities

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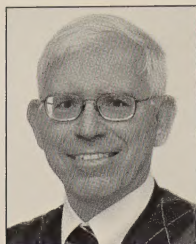
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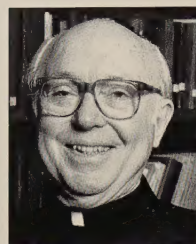
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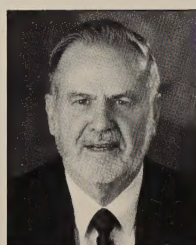
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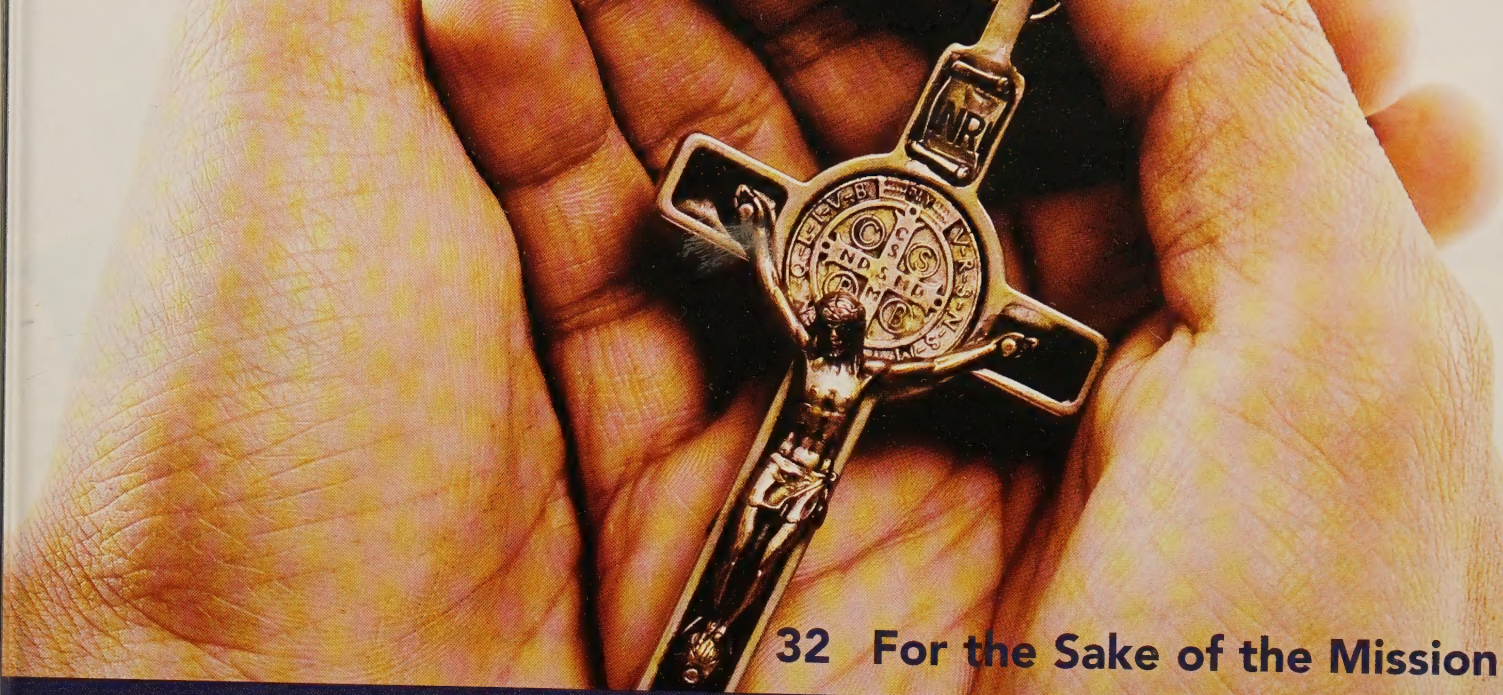
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Editor's Page

Mission vs. Margin



Catholic institutions do not exist to make money. They exist to serve the mission of the church and the gospel. But they need money to do that. And whether they generate those funds from their own activities, rely on the donations of others or do some combination of both, they face the challenge of having sufficient resources to carry out their purpose. This is often known as the tension between “mission and margin” and is the theme of this issue of HUMAN DEVELOPMENT.

It is a reality that underlies many of the stories about the church in the religious and secular media today. Dioceses are closing or consolidating parishes because they can't afford to support them. While these parishes have continued to faithfully proclaim the gospel, their parishioners have died or moved away and not been replaced by new ones. Religious communities must also face new challenges as their members have aged and vocations have declined. They no longer have the human resources to carry on with all of their ministerial commitments and their financial resources are stretched both by the absence of income and the high costs of medical care for their aging members. Catholic schools confront their own challenges. Paying a just wage to their faculty and staff has pushed the cost of tuition higher and higher. They struggle not only to keep their doors open, but to fulfill their historic mission of educating the poor.

Scarcity of resources is one dimension of the tension between mission and margin. A number of authors in this issue quote the familiar saying, “No margin, no mission.” While this is inarguably true, it leaves open the question of how to raise funds and how to manage them. Parishes and other Catholic non-profit institutions struggle with what kind of fundraising to do: Raffles? Trivia nights? Vegas nights? They likewise must discern how to spend and where to invest whatever money they may have to generate income. While there are, of course, many mutual funds that pledge to be green, non-military, or alcohol- and tobacco-free, religious communities have demonstrated that through careful investing they can do more than abstain from these activities, they can have a voice at the table to call corporations to greater social responsibility.

Those institutions whose mission brings them into a relationship with the government or corporations who pay for their services face an even more complex set of questions. While some have chosen to end these relationships or services, others struggle with finding a way to be faithful to their mission while taking the monies that are essential to maintaining their services.

Likewise those whose work requires them to employ—often in leadership roles—people who have little knowledge of the corporate mission have difficult challenges to meet. How do they provide the necessary formation for these leaders and engage in a collaborative leadership with them? How will

important decisions affecting the mission of the corporation be made?

This issue of HUMAN DEVELOPMENT brings together a group of leaders from a variety of institutions to examine these questions. None of these articles will provide a recipe or program to insure success. But the writers offer thoughtful reflections and share many creative approaches to the problems that they face. And they demonstrate that there is a lot to be learned from one another. Catholic hospitals and Catholic universities, for example, have been facing these questions for some time and have much wisdom to share. And that exchange is happening not only between them but throughout the spectrum of Catholic life.

As I reflected on these articles, three virtues emerged that these leaders all share: fidelity, collaboration and hope.

Tom Reynolds of Regis University expresses the challenge of fidelity as a process of “faithfully living a religiously-affiliated mission while retaining a more inclusive approach to hiring employees, serving constituents and including diverse viewpoints from both internal and external stakeholders.” It is a challenge that all these writers take seriously.

Bishop Howard Hubbard speaks eloquently of the place of collaboration: “The very nature of pastoral planning demands a collaborative approach, that is participation and cooperation by all the members of the church. . . . It demands letting go of personal agendas, being open to new possibilities, and when there are setbacks, having the personal faith, hope and courage to continue the dialogue and process.” Michael Miller of Trinity Health adds: “The burden of this struggle does not fall on one person alone. It is a shared responsibility supported through our formation efforts. Formation is a key strategy that Trinity Health uses to navigate the issue of mission and margin.”

And Len Calabrese expresses the importance of sustaining hope if we are to advance the legacy of the visionary leaders who founded so many of our institutions: “The movement forward, if it is to continue, will not happen by itself. What steps must be taken can be summarized in five words: a great hope in common. That is our call, that is our challenge, that is our opportunity, that is our privilege.”

Our hope is that this issue makes some of that wisdom available to you, our readers.

Robert M. Hamma

Robert M. Hamma

Letter to the Editor

Dear Editor,

In the Fall 2012 issue, Professor Plante discussed the 2005 Vatican instruction which states that homosexual acts are “objectively disordered,” leading him to conclude that it is official policy to exclude homosexual men from seminary; a challenging bind for psychologists as it contradicts the position statements of most professional organizations that homosexuality is not a psychiatric disorder.

Professor Plante asks where this leaves psychologists who conduct candidate evaluations. He offers three options: a complete evaluation discussing sexual orientation, which risks “outing” the candidate but leaves the decision to others; a modified, incomplete evaluation that does not address sexual orientation; or a complete evaluation that uses gender-neutral terms. Whilst recognizing that none is perfect, for Professor Plante the third option is the best available option.

I would suggest a fourth option, one which recognizes that the Vatican instruction does not exclude persons with a homosexual orientation but offers advice on how to differentiate between people so that an evaluation may consider how each applicant for the priesthood or religious life might best discern a vocation in light of his sexual orientation and history.

Exclusion criteria do exist in the words . . . *the Church, while profoundly respecting the persons in question, cannot admit to the seminary or to holy orders those who practice homosexuality, present deep-seated homosexual tendencies or support the so-called “gay culture.”*

Whilst “practicing homosexuals” refers to one group, an evaluation of sexual behavior is important in the discernment process regardless of orientation; anyone who has recently been sexually active needs a longer period of discernment in order to demonstrate the capacity to integrate his sexuality in consideration of celibacy.

The term “deep-seated homosexual tendencies” is ambiguous but seems to refer to those for whom a homosexual inclination is central to identity and who perceive themselves through the lens of what might be termed “being gay.” In many ways, this is an extension of the assessment of a candidate’s affective maturity and sense of belonging that is not determined by sexual orientation alone.

“Gay culture” is another vague term, but if we take it to reflect choices that express the differences between homo- and heterosexual lifestyles, it might be reasonable to assume that it refers to frequenting gay bars, attending gay pride events, or openly supporting activities which stand in conflict with church teaching.

Therefore, homosexual men are not being denied entry to seminary on the basis of sexual orientation alone. Questions around sex are intrusive, but necessary; they determine whether the candidate is dealing with the challenge in daily life of maintaining chastity in the face of sexual feelings. “Do ask” about sexuality is a position consistent with the need to determine if entering formation would be appropriate, possible and a positive factor in his life. “Do tell” follows; the decision as to the suitability of a candidate does not lie with the psychologist but falls to the discernment of the bishop. Not to ask and not to tell do not become questions in this approach, assuming the candidate has given informed consent and understands the implications of the evaluation for the decision-making process.

Dr. Andrew Peden, clinical psychologist, St. Luke’s Centre, England



Bishop Howard J. Hubbard

Imagining a New Future

How One Diocese Engaged in a Pastoral Planning Process



In the spring of 2006, the Diocese of Albany entered into a three-year pastoral planning process titled, “Called to Be Church.” Although we have had a pastoral planning office since the mid-1970s, most of our activity had centered on ad-hoc decisions such as the transfer or retirement of a pastor, a decline in a school’s enrollment or a fiscal crisis faced by a parish.

However, with shifting demographics (all but one of our cities have lost at least a third of their population and we had many “ethnic parishes” where members had relocated away from the cities to the suburbs), declining numbers of priests and fewer Catholics attending Mass regularly, it was decided we needed to undertake a significant review of how best to serve our people pastorally in light of these significant changes.

People brought a myriad of feelings to this challenge. There were feelings of anxiety about what this might mean for one personally and for one’s parish; feelings of anger and frustration—why can’t the bishop just leave us the way we are, everything is fine; feelings of skepticism and cynicism about whether grassroots input would matter—the diocesan officials already know what they’re going to do, they should just spare us the time, effort and energy of engaging in an exercise of futility.

There was also the mirror-image criticism: Why doesn’t the diocese have a plan? It’s obvious what needs to be done. The bishop and his staff must just lead. Make the decisions, announce them and, then, everyone can move on. And there were feelings of hurt and loss about a church that some felt was adrift or in a process of dying. I could understand and

empathize with all these feelings because I knew change is unsettling under any circumstance; but even more so when change affects our faith and our spiritual home, the parish.

While change is an inevitable part of life, it need not be traumatic. It can be an opportunity for growth, renewal and revitalization. I hoped, then, that the "Called to Be Church" initiative would be precisely such an opportunity: an opportunity to dream a new church into being; an opportunity to evangelize and re-evangelize; an opportunity to recommit ourselves to realize the kingdom of God more fully and to fulfill our diocesan mission more constructively: "We are God's priestly people sharing a responsibility to witness God's unconditional love and to bring Christ's healing presence to our world."

The psychologist Dr. Patricia Kelly has suggested that perhaps the best way to understand change—real change—is to recognize change as conversion, an opportunity to see and relate to life's experience in a new way. Think of something as simple as seat belts. Most of us remember when people resisted seat belts as an invasion of privacy, an affront to personal choice and so on. Through multi-modal education, however, a gradual but fundamental shift emerged. While some folks still may remain cavalier and leave the belts dangling open, most of us buckle up. The "you can't tell me what to do" attitude has been transformed to a concern and commitment for personal safety and for the benefit of one's family and the wider community. This example demonstrates that transformation occurs when the notion of relating to an experience or person in a new way touches the heart.

Within the church, some people continue to cling to the notion of parish based on the geographic boundaries or the ethnic realities of more than a hundred years ago when their parish was established to meet the needs of that time, rather than on our current understanding that the parish is the instrument to fulfill the mission of Jesus, a mission that takes primacy over geography and ethnicity. Our call to be church today necessitates that we expand the notion of parish if we are to fulfill that call. No matter how upsetting this may be for some, our love

for Jesus and our call to witness to his mission and ministry require this transformation.

VIEWING CHANGE POSITIVELY

As we began the "Called to Be Church" process, I posited that we must view pastoral planning and change through a positive lens that has a developmental thrust, through a lens that is freeing.

To view planning and change through a negative lens that is filled with fear, resistance and blame is unhealthy and stifling. Indeed, fear is the enemy of change and planning. Decisions that are fear-based tend to be reactive and premised on survival rather than on mission and conversion. To embark upon a process of real change, therefore, means to accept an uncertain future. It demands relinquishing a degree of control. It is a time to ask the essential questions, to revisit the mission and to make a deeper and more mature commitment to our faith.

Each generation of the church must go through its own Passover from death to life in order to prepare the church for the next generation. We face wonderful opportunities and challenging problems. An honest and full experience of both allows us to be open to the creative power of the Spirit. God has a difficult time operating in illusion and delusion but revels in reality.

This is what we sought to do in our "Called to Be Church" planning process, namely, to focus on our reality and how to address that reality with hope, courage, vision, energy and enthusiasm; and in a spirit of trust, genuine collaboration and prayerful discernment.

Our reality is that we are the people of God who by baptism have been called to be church, to witness to the presence of Jesus Christ in our midst and to live that radical call to discipleship that the Gospel demands. We must now ask the question: What do we need to do today in order to create the condition for the possibility of belief and witness both for ourselves and for those who will come after us?

Although our reality as a people of God and our mission as a church remain constant over time, the manner in which we live that reality is dynamic and ever changing. In other words, our human

journey toward the kingdom of God, begun more than two thousand years ago, has been marked by many twists and turns along the way.

The church the apostles knew in terms of organization, roles, ministries and structures was not the church of fourth-century Rome, of the medieval monastic movements, of the Post-Reformation period, or of those who first felt the winds of change and renewal emanating from the Second Vatican Council. The cultural, social, economic and ecclesial realities in previous periods of history were different, but the essence of the church and its mission remain the same.

Thus, our challenge is to reassure ourselves that it's okay to let go of the past and continue the journey with the Spirit who is within us and within the entire church, ever confident that Jesus continues to be at our side as "the way, the truth and the life" (John 14:6).

FACING CHALLENGES WITH HOPE

What are some of the challenges we experience that are different from our diocesan ancestors in the faith? We are confronted with the cultural realities of rampant secularism, individualism, consumerism and moral relativism; a loss of trust in institutional structures in general, aggravated in our church by the recent scandals of clergy sexual abuse; the loss of the family unit as a prime transmitter of the faith; shifting demographics from cities and rural areas to the suburbs; declining Mass attendance, especially on the part of those born post-1950; and the dramatic decline of vocations to the priesthood and religious life, just to mention a few.

It must be remembered, however, that we face these challenges with resources that would have been unimaginable to our parents, grandparents and great-grandparents in terms of the educational background, the social status and the economic level of our membership. Our challenge is to steward these resources effectively so that the mission of Jesus can grow to the fullest.

Moreover, while over the past few decades there has been an increasing shortage of ordained priests and vowed religious, there has also been the restoration of the diaconate and an explosion of lay ministry both in terms

of professional church ministers and volunteer servants.

Furthermore, and most important of all, the Spirit promised by Jesus and unleashed by the Father on the first Pentecost continues to abide with us and within us as a sure and steady source of guidance, inspiration and strength.

So we must continue to move forward not with fear and timidity, not with apprehension and cowardice, not with apathy, complacency and indifference but with hope and optimism. Our hope and optimism come from knowing that we are God's people; that God will never abandon us; and that through the power of God's spirit we can confront the challenges before us, overwhelming as they may seem. We can find creative and constructive solutions that will enable us to continue the mission of Jesus in our day and to pass on the precious heritage of our Catholic Christian tradition to the next generation.

"Called to Be Church" is the vehicle we chose in the Diocese of Albany to do this. The very nature of pastoral planning demands a collaborative approach, that is, participation and cooperation by all the members of the church—priests, deacons, religious and laity. It demands letting go of personal agendas, being open to new possibilities, and when there are setbacks, having the personal faith, hope and courage to continue the dialogue and process. We are called to recognize that the mission of the church, namely, evangelization and building up the kingdom, is not just the responsibility of the diocesan bishop, the planning office, pastors and parish life directors. It is a joint responsibility, one that belongs to all of us.

FOCUSING ON MISSION

Rather than looking at pastoral planning solely through the negative lens of realignments, reconfigurations, closings and consolidations, we must, I believe, view the process as an opportunity: an opportunity for imagining and creating our future. In this regard the pastoral planning process must be focused not on structures, buildings or personnel statistics, but on mission. It is the mission that needs to determine our structures and configurations, not vice versa.

Therefore, before getting down to the nitty-gritty of the planning process itself, I convened seven regional "town hall" meetings to initiate this dialogue and to listen to people's concerns. More than 10,000 parishioners attended.

In his 1975 Apostolic Exhortation, *Evangelii Nuntiandi*, Pope Paul VI states, "The church exists in order to evangelize . . . evangelization is the essential mission of the church."

Commenting on Pope Paul's exhortation, the well known English theologian, Dr. Adrian Hastings states:

It is somewhat misleading to say that the church has a mission as if the existence of the church comes first. In truth it is because of the mission that there is a church: the church is a servant and expression of this mission. The mission consequently dictates the nature of the church and insofar as the church fails to live up to the demands of its mission, it is effectively failing to be church.

If this be the case, if the mission of Jesus rooted in the liturgical and sacramental life of the church and reflected in service to others is at the heart of our Catholic Christian community, how do we assess and analyze what the specific challenges are for fulfilling that mission in this time and in this place?

I posed a series of questions to be part of that discussion with our diocesan community.

1. What of our present parish and diocesan life must absolutely be maintained and sustained in any pastoral planning process?
2. How do we envision church ministry evolving and who will be our ministers? How do we foster vocations to all church ministries including the priesthood, diaconate, religious life and lay ecclesial ministry? Do we accept the present decline of ordained and vowed ministers as a given? If not, what can we do to reverse the trend? Also, how can we best draw upon the continued generous availability of our retired priests?
3. Are we making the best use of our deacons and lay ecclesial ministers? How can they be better supported and resourced for fulfilling their roles, responsibilities and ministries?

We are called to recognize that the mission of the church, namely, evangelization and building up the kingdom, is not just the responsibility of the diocesan bishop, the planning office, pastors and parish life directors. It is a joint responsibility, one that belongs to all of us.

4. I stated my conviction that the parish has been and will continue to be the hub and center of the church's life. I noted, however, this assessment does not mean that all parishes must function the same way or that the style of parish life in the future must be predicated on the past. Are there other models than the parish as we have known it that should be considered in fulfilling our mission in the twenty-first century?
5. I also stated that as a Eucharistic community, for the present and foreseeable future, the norm should be a full Eucharist in every parish each weekend. Do you agree with this assessment? If yes, how can we insure quality celebrations of the Eucharist given our declining number of priests? If not, what model would you propose?
6. We have had thirty years experience of pastoral planning in our diocese. What have we learned? What has been its shortcomings? What can be improved?
7. How do we assure that pastoral planning addresses not only the reality of parish life in our diocese but also is coordinated with the ministries of our Catholic schools and Catholic Charities agencies, as well as the needs of those in our hospitals, nursing homes, college campuses, county jails and state prisons?
8. How can we address the theological and psychological concerns of our priests about the model that has been evolving? Some priests are worried about how much they may be expected to do in the new model. Many priests feel they are losing their identity and rootedness in a particular parish community, having their pastoral role now assumed by parish life directors or parish staff, and hence becoming more of an anonymous or neutral functionary rather than a real pastor. As the role of priest continues to change, how can he find meaning in his life and ministry, and what must we do to increase the awareness of our Catholic people regarding the

issues being faced by our priests as well as foster a culture of vocation to priestly ministry?

9. At times in the past the pastoral planning process has resulted in anger, polarization and alienation. How can the process become more an opportunity for an appreciative recognition of what has been and for healing and reconciliation as we continue to move into the future?

Ultimately, I was convinced that our pastoral planning process had to be rooted in prayer; prayer which is not just the bookends at the regional meetings or at the start and finish of the planning group meetings, but prayer which precedes and permeates the entire process.

Thus, I suggested that prior to even starting the planning process we commit ourselves to the following practices:

- That all participating in the process agree to pray each day for wisdom and for the courage to remain focused on the mission, undeterred by personalities and personal interest.
- That we invite prayerful support from our parish communities; that the process of pastoral planning be included in the prayer of the faithful at every Eucharist.
- That we establish prayer teams whose members agree to pray for the participants in the process, especially before and during each meeting.
- That we devote the first twenty minutes or so of each session to a theological reflection, either from the scriptures or some pertinent church document or spiritual book. It is such prayerful reflection that will open our hearts to the promptings of the Spirit and to a willingness to move to that place where God is leading us.
- When a decision is called for, that we allow some time for quiet prayer or reflection before the group is polled.

These practices of grounding the entire process in prayer, I believe, helped to keep us focused on the mission and enabled us to address complex problems with civility, tolerance and charity.

THE ACTUAL PROCESS

Beginning in January of 2007 every parish in the diocese was divided into one of 38 planning groups or clusters. These groups were as small as two parishes and as large as seven, but most were in the 4-5 parish range. Each cluster or planning group was assigned a facilitator provided by the diocese and each parish could have between 5 to 10 representatives. More than 1,000 parish representatives participated in monthly meetings and discussions regarding parish demographics, finances, building facilities, liturgical and sacramental life, lifelong faith formation, Christian service, church administration and how to grow church leaders.

There were certain predetermined criteria to which each of the 38 clusters had to abide. The status quo was not an option. Every cluster had to develop some form of reconfiguration: closure, merger or linkage.

Each cluster was given the projected number of priests to be available for their cluster over the next five years and no priest was expected to celebrate more than five Masses on a weekend. Further, no regular Sunday liturgies in the absence of a priest were to be an option. A liturgy without a priest should occur only in an emergency situation.

Also, all local planning groups had to offer plans and recommendations to demonstrate pastoral vitality and fiscal viability for the period from 2009 to 2013.

Finally, every parish that was recommended to remain open had to affiliate either by merger or linkage with one or more other parish. No parish was to remain a stand-alone entity.

Each planning cluster was allowed to set its own schedule, as long as the plan was ready to be submitted to the diocese by June 30, 2008. If three months before that date representatives felt they were at an impasse, they were encouraged to contact the pastoral planning office for mediation or other assistance to resolve the impasse. All clusters met the June 30th deadline, although some issued minority reports.

Between June 30 and November 15, 2008, a 24-person review commission

appointed by myself, consisting of priests, deacons, religious and laity reviewed each cluster plan. If the review committee concluded that the criteria established were not met or if there were minority reports, members of the review committee met with the cluster members involved either to resolve differences or to make suggestions as to how to bring the report up to acceptable standards.

The review committee issued its report to my office with recommended modifications by Thanksgiving 2008. These recommendations were made to the diocesan Board of Consultors and approved by that body the final week of December, 2008.

The ultimate recommendations called for the outright closure of 16 parishes, 15 mergers of multiple parishes and seven mission church closings. A total of 33 worship sites were closed as a result of the three-year process.

While there was disappointment, unhappiness and anger on the part of some parishioners, especially in those parishes that were closed outright, overall the plan was accepted amazingly well. There were no protests, marches or attempts to occupy churches.

KEYS TO SUCCESS

If there was a key to bringing this venture to a successful conclusion, it was the process itself involving so many local parish representatives and excellent grassroots communication.

In June, 2006, we held a press conference with the print and electronic media announcing the launching of the "Called to Be Church" process and the format for it.

We developed a communications manual for local planning groups, pastors and facilitators with suggestions for a total communication strategy throughout the process including key messages, timetables, town meeting formats, how to deal with angry and upset parishioners and working with the media.

Transparency and accountability were to be the hallmark in each parish and each local planning group. The various options under consideration were to be published regularly in parish

bulletins, parish meetings were held to discuss preliminary recommendations and final cluster recommendations were communicated to parishioners with opportunity for comment before being submitted to the diocese.

The same was true for the review committee process. Hence, there were no surprises to parishioners about what was being considered or recommended, and they had ample opportunity to voice either to the local planning group or to my office their concerns about plans that were being formulated.

The week before the final recommendations were announced in January, 2009, I met with the editorial boards of the newspapers and TV stations within our diocese to do embargoed interviews about the process, the reasons for decisions being made and how ultimately the plan would strengthen our parishes. Also, representatives of the diocese met with the mayors and civic leaders of the communities to be affected before the announcements were made as well as with historic and preservation associations.

I am convinced that this communication strategy was helpful, and at least for the general public, minimized the emotion and underlined the reasonableness of what we were trying to accomplish.

The announcement of the closings or mergers was not the end of the process. Each year the 38 clusters have to make a progress report on how the parish and inter-parochial plan is being fulfilled. This is monitored closely by Over the past three years we have seen creative and innovative joint programs developed within clusters for evangelization, the Rite of Christian Initiation of Adults, pre-Cana programs, youth ministry, adult faith formation, retreats, services to the unemployed, programs for returning veterans, etc.

We have also determined that certain parishes, especially in our inner cities and small rural communities, may not be fiscally viable but are vital for mission. Consequently, we have determined that these must be subsidized financially either by the cluster or the diocese. Otherwise, we would be placing margin before essential mission.

Also, four task forces were established to address unmet needs that sur-

faced during the process:

- A human service and pastoral care task force, for the five cities where parishes have been closed to insure that the needs of the poor and disadvantaged continue to be met in these communities;
- An evangelization task force to assist all the parishes in the diocese to reach out to those disaffected by the process, to fallen away Catholics and to the unchurched;
- A campus ministry task force to assess how to serve more effectively the needs of students at the 16 colleges in our diocese;
- An Hispanic ministry task force to develop a plan to meet the unique cultural, social and spiritual needs of this community in our cities and rural communities.

Our forbears weathered the upheaval and pain of the Civil War, the bigotry of the Know Nothings and Klu Klux Klan, the Great Depression, the destruction of the two World Wars of the twentieth century, the turmoil of the Civil Rights Movement, the changes of the Sexual Revolution and the shift in ecclesiology and theology generated by the Second Vatican Council.

Now we have accepted the challenge of taking the next step on our diocesan journey of faith and service. We have sought to do so by being open to change, focused on the mission, grounded in prayer, inspired by our ancestors' ability to adapt to the realities of their day and confident that with God's abundant grace we will prevail.



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Integrating The Catholic Community





Leonard M. Calabrese

In Mark's Gospel there is the familiar passage about the return of Jesus to Capernaum where so many people came to hear him and sought healing that there was no room to get into the house where he was staying. There was no access. Four men were carrying a paralytic on a pallet to him. There being nothing in Galilee then comparable to the Americans with Disabilities Act, Mark says that "Unable to get near Jesus because of the crowd, they opened up the roof above him. After they had broken through, they let down the mat on which the paralytic was lying" (2:4). An older translation describes the scene even more radically: "They stripped off the roof where He was." That is quite a remarkable example of people working together in solidarity with a suffering person to ensure access. Jesus responded by being so edified with their actions and with their faith that he forgave the paralytic's sins and healed him on the spot.

A COLLABORATIVE INITIATIVE

For nearly five years I have been privileged to work with leaders heading Catholic organizations collaborating for the sake of mission to open up more access to services and care in Northeast Ohio, especially for those vulnerable and often left out. Catholic Community Connection is a unique collaboration of Catholic-sponsored education, health care, human services and senior living ministries across the eight-county Diocese of Cleveland. The eighteen ministries sponsored by eight religious communities and the diocese have come together over the past ten years out of their common

Mission and Margin Connection Story



grounding in Catholic social teaching and their common Catholic identity.

Through Catholic Community Connection, a separately incorporated 501c3 nonprofit with its own staff, they seek to foster collaboration in providing better quality care and services across all stages of life while exercising good stewardship for the sake of the people they serve and the common good of Northeast Ohio communities. All of those leaders and organizations are very professional in what they do, very attentive to the financial realities that exist today and very prudent in carrying out the business dimensions of their responsibilities which are multiple and complex. At the same time they are all steeped in mission. They are dedicated, each in their own way, to enfleshing the social mission of the church. All of the various ministries take seriously their call to carry out the teaching, healing and caring mission of Jesus in our time and place. You can't imagine our communities without them. Further, they have all committed to working collaboratively toward a "continuum of care." This is an integrated delivery system for those who need services all along the life spectrum. Catholic Community Connection is an exceptional story of Christian love being put into action in our midst with competence, compassion and creativity.

This collaborative initiative is all about adding value—value in mission, value in margin, value in quality—by applying the belief that the organizations are better and stronger together. Despite different governance, different sponsorship, different size and scope of service, all of the members are vibrant expressions of the public, social ministry of the church. *Deus Caritas Est (God Is Love)*, Pope Benedict XVI's first encyclical, pointed out quite dramatically that the social ministry of the church is as important for our faith as scripture and the sacraments. Catholic Community Connection organizations take their Catholic faith identity and values seriously through diverse but robust expressions: regular liturgies, prayer services, service opportunities, pilgrimages, mission trips, staff in-services, Catholic social teaching sessions, spirituality pro-

grams, retreats, mission audits and outreach with Catholic parishes and lay groups, to name just a handful. All the members provide a range of valuable services for our church and our communities, as well as their own staffs. They are each a major anchor and contributor to Northeast Ohio.

Catholic Community Connection itself spans both mission and margin activities, often fused together. Our continuum of care and service activities are clearly a concrete application of the Catholic social teaching principle lifting up a special love for the poor and vulnerable. Parishes and community groups contact our Nurse Navigator with difficult, complicated human situations. She tries to help those individuals access resources within our Catholic community or connect them with appropriate public agencies. At the same time the work of the Catholic Community Connection Outreach Committee with parishes also is meant to make our organizations better known to Catholics in the pews to generate more referrals to Catholic institutions. Heightened visibility is for the sake of both carrying out mission and enhancing profitability with the needs of the person always being front and center. Equally important is our role as a convener, a catalyst, a clearinghouse, a connector, a common ground, a bridge builder—all for the sake of the common good, for the sake of the social mission of the church, for the sake of advancing God's reign among us. Catholic Community Connection strives to communicate and lift up the good news that Catholic ministry in education, healthcare, human services and senior living is extensive and vibrant in the Diocese of Cleveland, especially for those who are struggling, are in need and are vulnerable.

ON THE SHOULDERS OF GIANTS

We have a great history and legacy in the Diocese of Cleveland. We stand on the shoulders of giants, amazing priests, nuns and lay people who have created an impressive network of Catholic colleges, hospitals, nursing homes, hospices, charities and services that benefit hundreds of thousands of

persons annually. We have these outstanding institutions because Catholics have taken the Incarnation so seriously. I believe we have a strong tradition in the United States and especially in our diocese of wanting to get our hands around things in order to make the compassion of Christ real and lasting. So we have built this broad and deep social infrastructure to better serve God's people with all kinds of needs. It took, of course, dedicated men and women acting in response to God's call and grace. So many Catholic institutions that we now take for granted and that play such important roles in the life of the church and in our community have humble origins in the pioneering, often heroic actions of religious women and men together with their lay collaborators. They loved Jesus and were impelled to live out that love in service to their neighbors. They also were practical and attentive to the financial realities of their time while taking risks and making sacrifices.

The groundbreaking national exhibit *Women & Spirit: Catholic Sisters in America* was striking in telling and showing the story of so many nuns who changed the history of our country and church through their innovative contributions. That exhibit was so successful when it came to Cleveland in 2010 that a parallel exhibit was developed. *Progress & Promise: Sisters Serving Northeast Ohio* chronicles the struggles and accomplishments of women religious in our region from 1850 to the present. It still makes the rounds, especially of Catholic Community Connection organizations, together with a booklet commissioned by the Sisters of Charity Foundation of Cleveland. The exhibit and booklet document a noteworthy saga and provide a stunning alternative to the all too common images in American culture of flying nuns or sisters wielding rulers. It shows women who certainly could and did hold their own with the entrepreneurial, builder bishops of the nineteenth and twentieth century American Church so central to Charles Morris' evocative history *American Catholic*. Both that book and *Progress & Promise* provide numerous examples of Catholic men and women integrating a strong



sense of mission while dealing effectively with the bricks-and-mortar business demands of founding so many social ministry institutions still ministering to this day. The saga continues and indeed new chapters are being written.

NEW CHALLENGES

Catholic hospitals, nursing homes, colleges and Catholic Charities have grown phenomenally over the decades. Typically they have become highly professionalized, very sophisticated and more and more specialized in order to carry out their original missions in a rapidly changing world and pluralistic society. In the process they often grew apart from other Catholic institutions, despite having roots and missions that were very close. We also see political and economic pressures forcing organizations to align more closely. More of our ministries and leaders are asking how can we live out our faith, the legacy of our founders and our Catholic social teaching in more cooperative, interdependent ways that provide better quality care and services for all God's people and remain sustainable. More intentional collaboration, as demonstrated in Catholic Community Connection, is one such way. Ziegler, a specialty investment bank headquartered in Chicago that works extensively with Catholic-sponsored senior living providers, thinks so highly of intentional collaboration that it featured Catholic Community

Connection in a new e-newsletter for Catholic ministries called *Catholic Finance*.

That path of intentional collaboration is especially a path for the involvement, participation and leadership of lay men and women. Popes and bishops have consistently taught over the past century that the social mission of the church is in particular an apostolate of the laity. The Second Vatican Council stated that "It is the special vocation of the laity to seek the Kingdom of God by engaging in temporal affairs and directing them according to God's will. They are called by God to contribute to the sanctification of the world from within, like leaven, in the spirit of the Gospel." We need more lay people involved not only as volunteers, not only contributing their competence and expertise, but also as leaders for the future sustainability and vitality of Catholic-sponsored social ministries both internally and externally. Such ministries are real assets for our church and can play an even more significant role in "the New Evangelization," a point emphasized by Bishop Gerald Kicanas of Tucson at the recent World Synod of Bishops. He stated there that "the importance of works of charity and justice are fundamental to the new evangelization. When people see the good the Church is doing, experience the love the Church is presenting, this is the way most people encounter the Lord. . . ." Social ministries are great witnesses to the faith, credible examples of hope,

compassion, transcendent values and especially love for others rooted in love for God. During Pope Benedict XVI's visit to the United States, in his speech at the Catholic University of America, he stated that "the Church's primary mission of evangelization . . . is consonant with the nation's fundamental aspiration to develop a society truly worthy of the human person's dignity." Recognizing the God-given human dignity of every person is, of course, a core value of Catholic Community Connection and all of its member organizations.

ADDING VALUE

The members of Catholic Community Connection are assets in four ways.

First, they provide the Church with experience that is deep and broad—experience in health care, in ministry with the aging and the dying, in education and in social services.

Second, there are all kinds of relationships with all kinds of people across the age spectrum from the youngest to the oldest, from the affluent to those most in need; with public and private leaders and with those who are sick, vulnerable, poor or seeking education.

Third, the organizations have tremendous reputations for quality and compassion as well as ethical leadership among Catholics and non-Catholics alike across Northeast Ohio.

I believe we are seeing a new springtime for Catholic social teaching, especially among those who are part of the Millennial Generation.

Fourth, I believe that all of these social ministries have a role in helping teenagers and young adults think about vocation in newer and fresher ways. There are great things going on in our Catholic high schools and colleges, especially in regard to Catholic social teaching and service.

I believe we are seeing a new springtime for Catholic social teaching, especially among those who are part of the Millennial Generation. But, at the same time, we have to help young people be more aware of not only the existence of institutions such as those that make up Catholic Community Connection, but also be aware that there are career paths for lay people within all of them that combine making a living with living out their faith. We need to do a better job of connecting young adults with social ministries and helping them see in those organizations paths to satisfying the deepest desires of the human heart, not only for those served but also for those serving. They can do good, love God and make a difference in our world as many of them really desire to do. That desire is from God and encompasses the desire for growth, contribution, depth as a person and the desire to live a life of meaning.

I think Pope Benedict sees that reality and opportunity in the social ministries of the church in the United States. I believe that is one reason he was so affirming about the church in our country when he visited in 2008. He reiterated that the Church of Jesus Christ cannot be authentic without the social ministries of the church. That social mission is at the heart of who we are and what we believe as Catholic. Catholic Community Connection continues the presence of Jesus in our broken world. Lay leaders of Catholic colleges, hospitals, human services, and senior living organizations are also well positioned to demonstrate that "The alternative path of faith-based 'servant leadership' provides business leaders with a larger perspective which helps to balance the demands of the business world with those of ethical social principles, illumined for Christians by the Gospel," as the Pontifical Council for Peace and Justice said in its March 2012 statement *Vocation of the Business Leader: A Reflection*. That document also noted the problem of leading "a divided life," which is a dangerous split between faith and daily business practices. That split

was named in *Gaudium et Spes* as "one of the more serious errors of our age" and it is still prevalent. Many social ministry leaders balance sound management and business practices with a deep commitment to mission, showing that the division between faith and work can be overcome.

There are further benefits for civil society emanating from the work of all those who make up Catholic Community Connection.

First, they work to strengthen the common good. All the organizations are important providers of services vital for our society and region. These services are especially significant safety nets for our more vulnerable neighbors of all ages and conditions.

Second, they are community anchors, noteworthy parts of the social fabric of Northeast Ohio.

Third, they play a real economic role in our region, employing nearly 8,000 people, holding more than a billion dollars in assets and capital investments and providing tens of millions of dollars in annual operating budgets.

Fourth, they demonstrate that charitable, educational and health care activities can be carried out with a high degree of competence, compassion and morality.

Fifth, they hold up a vision of the common good flowing from a Gospel perspective at a time when excessive individualism, extreme secularism, pervasive materialism and a corrosive cynicism challenge us all.

Sixth, they are credible conveners and advocates for the sake of those they serve. Most of them belong to trade associations that lobby and work on public policy, but there is something particularly powerful when they come together as Catholic entities with a common message. Public officials have commented on that power for advocacy after attending events that brought together Catholic leaders from across the continuum of services.

Seventh, they contain examples of selflessness, even heroism, in dedicated service to others that point to transcendent moral values.

The members of Catholic Community Connection appreciate the diverse, practical benefits available to them within the alliance ranging from group purchasing, to a holistic wellness program, to spiritual programs helping employees better integrate Catholic



social teaching and values into their delivery of care and services, as well as the opportunities to connect with parishes and have their respective staffs build relationships. The organizations intrinsically give testimony by their coming together that the church is a mystical body in which all the parts have a role to play, in which each part is essential to the vibrancy of the whole. So collaboration is not just a nice thing to do, but has a deeper meaning and mission. The organizations are tremendous living legacies that are committed to access for all God's people. Those legacies of living the Gospel and carrying out the great social mission of our church are especially seen in the examples of remarkable religious, as well as the lay collaborators they have so often formed and inspired.

A VISION FOR THE FUTURE

Two poetic reflections come close to capturing that vision of the ongoing value and spirit found in the ministries represented in Catholic Community Connection. The first was written by Sr. Mary Immaculate Murman, a Sister of Charity of St. Augustine, as a tribute to the founding sisters of her community in Cleveland. I think it can also be applied to the other founders of our Catholic Community Connection ministries.

And so they came—those valiant women came—not lured by any thought of wealth or fame; but with Christ-like love and ardent zeal they sought the temporal and eternal weal of dear-bought souls for whom

the Savior died. And on His strength and in His help relied. They labored well; they sowed the fruitful seeds and left to us the heritage of their deeds. May we, whose honored task it is to do the work they started, inherit, too, their spirit strong in Christ-like faith and love; be ever mindful that like them we must hand down to others as a sacred trust a service, dedicated to those in need.

And from the legendary 20th century Jesuit scientist and mystic Pierre Teilhard de Chardin comes this reminder about the call to ministry which still speaks to us.

We are called to be pioneers. Pioneers who stand on the edge of great beginnings, of unseen futures. Pioneers filled with unwarranted confidence that visions give. Pioneers whose eyes and ears are elsewhere, who hear an echo of possibilities as music poised to enter the universe. The movement forward, if it is to continue, will not happen by itself. What steps must be taken can be summarized in five words: a great hope in common.

Catholic Community Connection exists to continue those amazing legacies of Catholic social ministry in Northeast Ohio and to advance the great hope in common that we have in them; for the sake of the common good, for our neighbors with all kinds of needs, and to help advance God's reign of peace with justice, dignity, compassion

and love for all. That is our call, that is our challenge, that is our opportunity, that is our privilege.

RECOMMENDED READING

The Catholic Finance Newsletter can be obtained at ldaly@ziegler.com.

Pontifical Council for Justice and Peace, *The Vocation of a Business Leader: A Reflection*, November, 2012. Available at www.stthomas.edu/cathstudies/cst/VocationBusinessLead/.

Mary Immaculate Murman quoted in Donald P. Gavin, *In All Things Charity: History of the Sisters of Charity of St. Augustine, Cleveland, Ohio 1851-1954*. (Milwaukee, Bruce Press, 1955).



Leonard M. Calabrese has been president of Catholic Community Connection since 2008. Before that, he served for 20 years as executive director of the Commission on Catholic Community Action at Catholic Charities Health and Human Services, Diocese of Cleveland.

When I first agreed to write about “mission and margin,” I recalled a saying that I had heard often as a university president—“no margin; no mission.” Perhaps every other president has heard that phrase or a variation of it, especially from chief financial officers and trustees during the preparation and approval of the annual budget. I can hear each of the five board chairmen with whom I have worked reminding me in his own way: “no margin; no mission.” And there is obvious practical wisdom in their advice.

Further, pairing “mission and margin” seems to suggest having to negotiate unavoidable trade-offs between the (noble) demands of institutional mission and the (less noble) necessities of finance. Every president and senior administrator in universities and colleges knows that trade-offs are unavoidable. No institution can do all the good that cries out to be done, because every institution has to work within its unique situation, with its own strengths and limitations, be they related to budget, physical plant, location and so on. As a result,



Brother Michael McGinniss, F.S.C., Ph.D.

Striking a Balance:

Four Personal Illustrations of an Everyday Responsibility



not every program gets funded and even very mission-expressive programs need to operate within the proper scale relative to the whole.

I was asked to reflect on the relationship of “mission and margin” from my perspective as a university president. What a president brings to this topic of relating mission and margin should be a sense of how to keep the mission of the institution front and center in every aspect of the life of the university, even while having to decide how to allocate resources that are necessarily limited. In my experience, the talent required to do this is most often a kind of mediating or balancing talent rather than a technique or strategy for deciding tough trade-offs and making cuts of programs or resources. This mediation requires that the president and senior administrators stand in the middle between mission and margin and keep both in play as plans and budgets are debated, as revenues and expenses are projected and weighed, as funding decisions are made and as programs are evaluated, expanded, reduced or eliminated. This mediating stance is constant, not episodic, especially in a very large and complex organization like a university where mission is expressed in a wide variety of educational programs serving a variety of unique constituencies. Balancing mission and margin is an everyday challenge.

So in these reflections I will comment upon scenarios taken from my own experience. Given the pressures on private and particularly Catholic higher education, I realize these scenarios are not unique to my experience, nor do they exhaust all the possible ways in which mission can be in tension with available resources. Scenario 1 is more strictly financial and calls for balance in the utilization of financial aid; scenario 2 involves mission more directly than finances but implicitly raises the question of cost and thus of marginal revenue; scenario 3 is mission-related and clearly contains potential financial implications; scenario 4 is more clearly about mission but requires financial support to put it at the right place in the institution’s agenda. In each scenario, the challenge is how to balance mission

and margin, not about eliminating programs.

My point of view is as the brother-president of a university in the tradition of the De La Salle Christian Brothers, a Catholic religious order founded in France in the 17th century to provide a Christian and human education to the children of the working class and the poor. Many, if not the majority, of Catholic universities and colleges in the United States trace their roots to founding religious orders with similar historic commitments to the poor. It is my sense that Catholic institutions of higher education struggle to stay close to their founding commitments, even while understanding that high tuitions may be putting their schools out of reach of the economically poor. That is certainly the case at my institution, but at the same time it is very focused on maintaining as much access as possible for those at all levels in the increasingly stressed middle-class.

SCENARIO #1: HOW MUCH FINANCIAL AID IS ENOUGH?

Picture a meeting of the Board’s Finance Committee where the subject is a preliminary look at the following year’s annual operating budget. This particular discussion, like those of past years, seems fixed on the line item for financial aid. Trustees’ questions are familiar: why do we have to give so much financial aid? Why can’t we be more like “school x” which gives so much less aid? How is it that our graduates have so much debt, even with all the aid that we offer?

There are no easy answers to these questions. For an institution like my own, the pressure on the financial aid budget comes from our location in an intensely competitive market and from the economic status of the families who have traditionally sent us their daughters and sons—the great majority of whom are middle class working families whose average incomes have been impacted negatively in the current economic climate. In addition, my institution is located in Philadelphia, which is at the center of a region with as many as one hundred institutions of higher

education within a reasonable drive’s time. Within the Archdiocese of Philadelphia alone, there are nine Catholic four-year institutions, one two-year Catholic college, and an archdiocesan seminary with a collegiate division.

This blend of institutional competition and a history of attracting many students from a particular economic status causes rating agencies like Moody’s to offer dire comments about the future of institutions which are heavily tuition dependent, with modest to small endowments, and predominantly regional, rather than national, student populations (Moody’s Investor Service, 2012).

Today Lasallian institutions at all levels are hospitable to students for whom access to higher education is not assured. My own institution has long prided itself on the number of its students and alumni who are the first in their family to attend or graduate from college. Even in today’s challenging financial and employment environment, our incoming classes have included approximately 30% or more of such students. For us, the question is not whether to try to make access possible but how much access we can provide and how many students we can enroll from this portion of our applicant pool. Thus, the question is one of balance.

This question challenges Lasallian presidents and trustees. Presidents know the institutional tradition and the financial realities and seek the kind of balance that can keep the institution’s metaphoric feet in both the world of Lasallian concerns and the world of operating budgets. Trustees understand the president’s concern for balance but also feel an added pressure in that many of them, now quite successful, remember working to pay their way through college in the days before Pell Grants, Stafford Loans and financial aid leveraging. Throughout my career as president at two Lasallian institutions, I have heard many trustees speak of working two and more jobs, but graduating debt-free.

In the midst of these pressures, institutional leaders must be able to speak the language of two worlds—the Lasallian world’s commitment to access

and the possibility of personal advancement and the financial world's concerns for institutional stability, reputation, careful management and attention to sources of revenue that lessen the pressure on undergraduate tuition. Skill in balancing between both worlds is needed in planning, budgeting and responding to the increasingly frequent letters and emails of families in financial distress pleading for increased financial aid.

SCENARIO #2: LIBERAL ARTS, "SOFT SKILLS" AND THE PRESSURES OF THE JOB MARKET

In a meeting of a key committee of the Board of Trustees, discussion was intense about planning for a new building for the School of Business. Several factors propelled the need for a new building: an iconic but aging current building; competition as nearby universities renovated and expanded their own facilities; the need to accommodate cutting-edge approaches in business education and in the learning styles of today's students. This discussion expanded beyond the strict portfolio of the committee and into the content of the curriculum in business and in the University generally. At a very crucial moment, one trustee, a graduate with a degree in business, said to me: "I didn't know I graduated from a liberal arts college." Surprised, I had to search for the words to explain the purpose of the undergraduate core curriculum steeped in the liberal arts and remind this trustee that he had indeed taken those courses. It's likely that I asked him lightheartedly if someone had exempted from those core courses.

Of course that trustee recalled the courses he had taken. In other contexts he had spoken with conviction about how his education shaped his moral and ethical outlook, sharpened his ability to analyze and communicate and gave him the foundations of his business success. His committee comment came out of concerns very much in the air today and on the minds of parents and prospective students, on the front pages of morning papers, and in the agenda of the U.S. Department of Education. Those concerns might be stated as a question: Is a

college degree worthwhile today, given the ever-increasing cost and the financial uncertainties of the "new normal"? While tuition is going up at all institutions of higher education, public and private, the tuition increases at private schools push the published tuition, the so-called sticker price, up very high.

Answering the question of return on investment or value is particularly important for universities like my own and nearly every other Catholic-identified college or university with roots in the liberal arts tradition and commitments to the study of philosophy, theology, literature, mathematics and basic science. On the campuses of such schools, the value of such a liberal arts foundation can seem to be taken for granted until there is a call for rethinking the core curriculum. In the context of such a rethinking, pressures toward timeliness, relevance, pragmatism and academic turf wars surface. Typically the outcome is a new core curriculum that integrates some new contemporary courses and disciplines with the traditional, but the concept of a core usually remains in place. Some might attribute the hardness of a liberal arts-based core to curricular politics or to simple resistance to change. But the demands of citizenship, the necessity of a moral compass for the practice of business and politics, and the sheer challenge of interpreting and integrating the vast amounts of data available also explain why university curricula continue to make a place for these "soft" skills.

Within the Lasallian tradition matters of practicality and relevance find a hospitable welcome. Lasallian institutions take their inspiration from the Brothers' founder, John Baptist De La Salle, who founded primary schools intended to help the children of artisans and the poor to make a life for themselves. That practical concern is always close to the surface in a contemporary Lasallian school, no matter its level. In the six Lasallian colleges and universities in the U.S., this practicality is most in evidence in that each of the schools has historically offered programs and majors that feature preparing for professions—education, engineering, business and nursing. Lasallian institutions

Answering the question of return on investment or value is particularly important for universities like my own and nearly every other Catholic-identified college or university with roots in the liberal arts tradition.

were committed to such professional education even when a more thoroughly liberal arts model was dominant in Catholic circles.

However, citing the Lasallian tradition's openness to practical and professional education does not mean that it is always evident in a particular institution at a specific time how best to balance mission and return on investment. But it does mean that the necessity of striking a balance is not foreign to the culture of the institution or to its leadership.

SCENARIO #3: MEETING OF CHIEF ADMINISTRATORS OF REGIONAL LASALLIAN INSTITUTIONS

The Lasallian administrative region in which my university is situated has begun holding meetings that bring together the chief administrators of Lasallian institutions, which in this case means administrators of low-tuition elementary schools, child care residential and educational institutions, private and diocesan-sponsored secondary schools, and two institutions of higher education (LaSalle and Manhattan College). This scenario takes place during a table conversation at one such meeting; participants were the chief administrators of institutions in and around Philadelphia.

The topic was to discuss and decide upon a common project that all the institutions in a geographic area would undertake. The impetus was a document outlining a vision and strategic action plan for Lasallian Ministries in eastern North America. The action plan was quite extensive and somewhat daunting for everyone at the table. The diversity of institutions represented contained its own challenges. As the group began to settle on a particular project, one of the administrators suggested that the university should take the lead on the project because it had the most resources in terms of endowment, faculty specialists and administrative support.

While there was truth in that perspective, I wondered how to explain that I just do not command the attention and participation of faculty members by fiat and also that our resources of time and

finances are limited. Here is a perfect illustration of being caught between mission and margin, between shared Lasallian ideals uniting disparate kinds of institutions and church ministries and the realities of budget and margins.

My response was a both/and, not an either/or—another illustration of the kind of balancing that I have characterized as central to a leadership role in a university. I agreed that the university would support and help organize planning for this common project and that we would engage faculty and staff with relevant expertise to help in refining the project and perhaps in seeking funding for its execution (depending upon the necessary match between the project and an interested foundation or donor).

SCENARIO #4: A MEETING OF UNIVERSITY PERSONNEL WITH LASALLIAN FORMATION EXPERIENCE

This final scenario is a meeting of approximately 20 people—faculty, some administrators and personnel from the divisions of Student Affairs and Athletics, all of whom had participated in experiences designed to familiarize them with the history and spirituality of the Lasallian movement. As the person who had invited each participant to attend these Lasallian workshops, I joined the meeting to hear what was on their minds after returning to the campus and trying to put their experience at the disposal of their colleagues and the institution.

Generally all of those present had had favorable experiences. Some had had profound personal moments of spiritual awakening or enlivening; others, affirmation of their long-standing commitment to the mission of the university. I felt myself in the middle as some of those present expressed their desire to do more for the university as Lasallian leaders and also frustration at not having more time, more support and more outlets for exercising such leadership roles.

In terms of sustaining and advancing the institution's mission, this group's enthusiasm and energy are critical. My institution, like many founded by religious orders, faces the gradual decline of

active members of the founding order and, attending that decline, growing challenges to maintaining a unifying appreciation of mission and institutional purpose. These institutions must work at developing and encouraging not just loyalty (which had always been strong) from lay members of the faculty and staff, but a lively and top-of-mind sense of mission and active commitment to all aspects of that mission. Achieving that kind of engagement calls for resources. In terms of the metaphor at work in this article, it is necessary to expand the base of people who can articulate and advocate for the continual balancing of margin and mission that goes on in the inner-workings of institutional life. Without attention to this part of the balancing act, it is possible to foresee a time when "no mission would mean that the margins do not really matter."

SUMMING UP

The brief scenarios presented here will sound very familiar to presidents, senior administrators and board members at private universities and colleges, especially those with religious affiliations and traditions grounded in a liberal arts core. As I said at the outset, these scenarios are not unique. All four scenarios share the common characteristic of calling for administrative balance that satisfies the demands of both institutional mission and available resources. Trying to achieve that balance is an everyday responsibility of presidents so that the institutional mission might be accomplished.

RECOMMENDED READING

Moody's Investor Service. (2012). *U.S. Higher Education Outlook Mixed in 2012*.



Brother Michael J. McGinniss, F.S.C., Ph.D., became La Salle University's 28th president on July 1, 1999, and is now in his third term. He has also served as President of Christian Brothers University in Memphis.



Tom Reynolds, Ph.D.

Mission Opportunities and Tensions: An Inclusive Perspective

The challenges of living out an institutional mission have only just begun with the successful completion of a new or revised mission statement, visioning exercise or branding-image campaign. Organizations as large and as old as the Catholic Church or as new and small as the latest neighborhood start-up have discovered these mission opportunities and tensions as they encounter the hopes and concerns of clients, congregants, students, donors and other stakeholders.

In recent years, these mission challenges have become particularly complex for religiously sponsored organizations such as hospitals, social service agencies and universities, which typically serve students, patients and clients from all backgrounds and faith traditions, employ faculty and staff without regard to religious affiliation and provide an array of services other than religious instruction. In these contexts, conflicts involving managing or “living” the mission, always plentiful anyway, can be magnified as the institutions contend with internal perspectives and mission priorities at the same time as they respond to the concerns of sponsoring religious organizations, governmental entities (as in the federal Health and Human Services [HHS] mandate controversy), funders and others. Historically, some of these institutions have responded to these tensions by severing their ties with their sponsoring religious denominations, as happened with many formerly religious colleges and universities like Harvard and Yale. Others have decided to forgo accepting funding from certain donors or government agencies in order to free themselves from various regulations or other obligations. Some have gone the route of emphasizing their religious character by focusing more narrowly on whom they serve or hire, a more sectarian approach.

While any or all of these responses to mission complexities may best serve the needs of the organization in certain circumstances, this article focuses instead on the challenges of faithfully living a religiously affiliated mission while retaining a more inclusive approach to hiring employees, serving constituents and including diverse viewpoints from both internal and external stakeholders. In particular, the examples and reflections come from my experiences at Regis University, a Jesuit Catholic university in Denver, Colorado. Our own context includes our realities as a university, our desire to be faithful to our Catholic tradition and our way of being Catholic in the Jesuit style. Further, we have three very distinct colleges within our university: one that serves young adults (18-22) with a primarily liberal arts, classroom-based educational experience; another that focuses on adult learners of many ages

with non-traditional classroom formats and on-line courses and a third college that offers health care degrees in a format that emphasizes clinical experiences along with both classroom and on-line instruction.

As a result, our mission complexities and opportunities are plentiful, but for purposes of this conversation, I'll focus on three challenges:

Hiring and orienting for mission. How do we balance being welcoming and inclusive to candidates while making clear we have a mission we value and that we expect them to contribute to it in a meaningful way? Also, where should we place our primary emphasis in mission orientation when we have neither the time nor resources to provide a comprehensive program for every new employee?

Financial challenges. As a former Regis president, Fr. David Clarke, S.J., once said in a *Wall Street Journal* interview, “We’re not for profit, but we’re not for loss either,” reflecting the reality that no organization can exist for long without sound financial management and a good business plan. As the popular saying goes, “no margin, no mission.” However, in a mission-driven setting such as a university, individuals can often justify almost any new venture they desire under the mission umbrella. For example in the Regis context, some have suggested that we should provide health or social services for vulnerable populations in our community, worthy goals to be sure, but ones that would certainly compete for time or money with our core business of educating students. Similarly, how do we compare the value of projects that provide opportunities for significant personal transformation for a few students against investments that will benefit many more learners but in more limited ways?

Also, how do we set priorities among our many worthwhile projects and goals? Which should receive budget or fundraising focus in our fundraising efforts and which should be protected in times of financial distress when we need to balance mission and fiscal realities?

Who decides and defines mission? For example in our context, what constitutes being Catholic enough, or conversely, being too focused on our Catholic identity? What about the many students and colleagues who are not

Catholic and who may come to feel that their contributions or perspectives are not being valued? In various situations, how are we faithful both to the noun “university” and to the adjectives “Jesuit” and “Catholic” in our identity?

Clearly, no simple formulas or guidelines can easily answer the questions embedded in the above challenges. Instead, each issue that presents itself needs to be addressed with sensitivity to both mission values and to other important institutional realities, as the case studies from the Regis experience will illustrate.

HIRING FOR MISSION

In an ideal world, all organizations, particularly those with a strong mission focus on service, would carefully hire and orient all new employees from a mission-based lens right from the beginning. But as organizations grow beyond the boundaries of the original founders or family business model, this proves hard to manage. Typically, institutions such as a university become more complex, offer a wider range of programs, and consequently, require the skills of individuals with specialized credentials, in our case faculty and administrators, regardless of their affiliation to our religious tradition. Hiring only members of the founding religious order, such as the Jesuits, will no longer do even if enough of them were available, nor would relying solely on committed Catholics. Professional accrediting associations and federal/state departments of education, who control the right to offer degrees, scrutinize faculty credentials carefully in their periodic reviews, all the more so when examining graduate and professional schools.

As a result, many religiously affiliated colleges and universities in the U.S., including most Catholic institutions, de-emphasized hiring for mission for an extended period of time in the latter decades of the twentieth century out of a desire to meet the professional standards of higher education and to end their intellectual isolation from professional peers in the academic disciplines. So when Regis and other similar universities began to introduce (or re-introduce) the concept of hiring and orienting for mission a dozen years ago, the move was not met with enthusiasm or



understanding initially. Faculty hiring committees were concerned that their professional judgments as to a candidate's academic qualifications would be trumped by ideological litmus tests of adherence to Catholic doctrine.

Another challenge was determining where to place the emphasis in promoting closer attention to university mission values in the hiring processes of an organization with nearly a thousand regular faculty and staff plus many hundreds more part-time faculty. Ideally, we should ask all of them to participate in identical hiring reviews and orientation activities, but this would be neither practical nor suited to the distinctive needs of different employees. Ultimately, we decided that while all faculty and staff should receive some attention to mission in their initial contacts with the university, we would focus our efforts primarily on two groups: full-time faculty and key administrators at the level of director and above, such as deans and vice presidents. We chose to focus on faculty, normally the largest class of employees at any university, because they usually serve longer terms than other colleagues and more importantly, they direct the curriculum and mentor our students—the core functions of higher education. While top administrators are fewer in number and don't stay on as long in most cases, we chose to focus on them because their day-to-day

decisions often set the tone for how well the university is perceived to be living out its mission.

In the case of full-time faculty, we designed mission materials suited to their particular issues and questions. As part of the hiring process, we asked them to prepare an essay describing how their individual experiences and interests prepared them to contribute to our Jesuit, Catholic mission, and we included mission questions in their interviews. Throughout this process, we were careful to assure the candidates and our hiring committees that we welcomed diversity in the faith traditions and beliefs among our faculty and that our request for them to reflect on how they might enrich our mission efforts should not be construed as a test of religious adherence. Further, we worked closely with the search committees in the early years of designing this process to guarantee that mission enthusiasm was not a substitute for professional competence. Only after candidates' credentials were determined to be suitable for a department's needs were they asked to submit the mission essay and discuss it during the interview process.

Even so, it took a few years of patient attention to the concerns of those in the hiring sequence for the academic community to trust that their needs were being taken seriously. It also took time for those of us who inter-

viewed the candidates about their understanding of our mission to realize first that there are no magic quiz questions that automatically elicit the correct mix of knowledge and support for our Jesuit, Catholic identity. Just as importantly, our ability to predict who will be a great contributor to our mission is no more infallible than our talent at spotting any other advance indicators of human behavior. I've been delighted to find new colleagues that I had some reservations about step up and make significant and creative contributions to the curriculum or students' out-of-the-classroom experiences, and I have also had some disappointments along the way with folks who talked a great game but then never followed through. Instead, I have learned to look for openness to our mission values and a curiosity about how others have thoughtfully implemented them, as opposed to a set template of correct responses. With such openness, we can build relationships with these new colleagues, discover their passions related to our mission and welcome them into a culture where their insights will be valued rather than scrutinized for mission "correctness."

Once faculty join our community, we ask them to participate in retreats, seminars and dinners during their first year to learn more about the practical applications of our Jesuit, Catholic identity. As much as possible, we try to have

Rather than setting a template of expectations, we have learned that building individual relationships with faculty and staff through the mission hiring and orientation activities has paid off through their creative responses and initiatives.

these activities led by veteran faculty, who bring both credibility and lived experience to the conversations. Then after the first year, we invite them to national seminars, conferences and retreats sponsored by all of the Jesuit universities in the U.S. on topics such as ethics in the curriculum, inter-religious dialogue, and incorporating justice themes into coursework, all values close to the heart of Jesuit education. In addition to the content gained from such experiences, we have also found value in the collaboration and networking that emerges when Regis faculty make contacts with colleagues from such institutions as Marquette, Creighton, Santa Clara and the other Jesuit schools. Even more importantly, these activities emphasize that these values are shared beyond our own campus and not merely a local preference of the Regis culture. This collaborative, national approach has also been effective with our senior leaders, as the Association of Jesuit Colleges and Universities offers an eighteen month experience, the Ignatian Colleagues Program, in which Regis has participated actively. The program includes an immersion week in Nicaragua or El Salvador, the Spiritual Exercises of St. Ignatius, online courses on topics such as Jesuit history, Catholic Social Thought, Justice in the Jesuit Tradition and development of a mission project.

Assessing the effectiveness of such mission orientation approaches requires qualitative judgments rather than quantitative measures, as the latter would imply that faculty and administrators must pass some kind of test of their knowledge or applications of our mission values rather than experience a welcoming into our community. However, a few indicators have given us some confidence that the approach is making a difference. In one instance, faculty asked for a follow-up version of their first year seminar, which they had nicknamed "J-Camp," so we designed "J-Camp II" for them. In other examples, faculty and administrative alums of these experiences developed key courses in our core curriculum around Jesuit mission themes, such as "Justice and the Common Good," "the Search for Meaning," and "Leading Lives that Matter." They designed courses to prepare at-risk high school students for the

college admissions/financial aid processes ("The Sociology of College Success"); and they organized service experiences for students to such locations as Appalachia, Ethiopia and Ghana. Rather than setting a template of expectations, we have learned that building individual relationships with faculty and staff through the mission hiring and orientation activities has paid off through their creative responses and initiatives.

SERVING FIRST GENERATION STUDENTS

One mission commitment in recent years that has broad support within the Regis University community has been preparing low income students in our surrounding neighborhoods for admission and success at the college level. These "first generation" students not only lack the financial resources to pay for the costs of college, but they also usually lack the necessary academic preparation from their high schools. In addition, because they are the first in their families to attend college or finish high school in many cases, they also lack the family experience to guide them through these complex processes.

As we developed programs to assist them, we were conscious of several challenges. First, because students often lacked family and school resources in their lives, we needed to design experiences that familiarized them with college and gave them a personal sense that this opportunity was a realistic aspiration. Further, waiting until their senior year in high school to begin our relationship-building was too late. As a result, our first effort involved creating an intensive summer program for these students (now the Porter-Billups Leadership Academy), which exposed them to a college campus after their fourth grade year of elementary school and continued through the summer following their junior year of high school.

A second challenge involved finding effective community partners who could provide the preparation and mentoring support these first generation students need. Fortunately for us, an innovative new high school model had been developed by the Jesuits in Chicago, Cristo Rey High School, designed to combine work experience

and college preparatory education. The Jesuits of the Missouri Province were anxious to partner with Regis and other local individuals to bring this experiment to Denver. Arrupe Jesuit High School opened in 2003, and with it came the opportunity for us to involve our students, faculty and staff in a wide array of support services for the new school and their students, including preparation for college admissions, life during the summers and intensive mentoring of their students during their freshman year at Regis. Fifty-six Arrupe graduates now study at Regis, and fourteen have graduated since the first high school graduating class arrived in 2007.

With these successful partnerships, we then replicated the models with several other community agencies, working with similar students throughout their high school years to prepare them for college and mentoring them as they entered their first year experience at Regis.

Just as importantly, we have had to face the challenges of costs for these first generation students, whose families can rarely afford any of the expenses associated with college. How were we to afford them and how were they to afford us? Fortunately, one of the advantages of the partnership model with community agencies or schools was that these groups often provided some funding assistance for their students attending Regis along with preparation and mentoring support. In addition, targeted fundraising for financial assistance has been successful in beginning an endowment fund for the Arrupe and Porter-Billups students, as their stories make effective campaign case statements for donors.

Such external scholarship assistance is crucial for universities like Regis to afford to help these first generation students at a time when the rising cost of financial aid for all learners, even those with some ability to pay, threatens our overall fiscal stability—again, the “no margin, no mission” challenge.

Two such financial dilemmas affected us early on with these students. First, while we initially desired to provide scholarships to cover all of the costs of attendance, including tuition, textbooks, housing and meals, doing so

would limit the number of students we could assist. So we limited our efforts to providing tuition support to more students without offering the other amenities like housing, as nearly all of these students live near the campus, and in many cases, they and their families preferred that they commute from home. But the first class of students had just begun their freshman year at Regis in 2007 when we learned that some of them lived in precarious, even dangerous, family circumstances, some lacked any access to health insurance, and many could not afford to purchase their textbooks, thus putting them at academic risk early on. So while we kept to our overall scholarship plan, we learned that we would need to put in place emergency funds to deal with housing, transportation, health and textbook issues on a case-by-case basis.

An even more difficult dilemma presented itself as we encountered instances of undocumented students in our community a few years ago. As with other low income students, they often share the challenges of poverty, lack of parental experience with college and weak high school academic preparation. In addition, they lack access to many of the financial aid resources available to U.S. citizens, such as Pell Grants, low-income state aid and subsidized loans. In fact, they are even denied access to the standard method for calculating financial need used by all American colleges and universities, the Free Application for Federal Student Aid (FAFSA). While Regis welcomed them without restriction for admission (unlike some state institutions) and made them eligible for academic merit grants, they could not receive additional federal or state financial assistance. As they continued their studies with us, the financial strain frequently became unsupportable, and well-meaning colleagues brought their plight to university administrators as a mission issue. Unfortunately, the lack of federal or state aid made them almost twice as expensive to fund with scholarships as citizen students. Given this reality, we had to reluctantly turn down these requests for assistance in all but a few emergency situations, as only a change in U.S. immigration laws, such as the Dream Act, can remedy their situation.

COPING WITH FINANCIAL DISTRESS

As with most American businesses and organizations, the 2008 financial crash and resulting recession required Regis University to confront some unpleasant financial realities. It soon became clear that we needed to cut budgets and address our students' ability to make their tuition payments, as many families faced layoffs, foreclosures and loss of investments designed for college expenses.

In managing our budget reductions, we first looked to the usual strategies: freezing salaries and open positions, reducing operating budgets and managing attrition to reduce payroll costs. When it became clear that we needed to further reduce staffing levels, the largest budget expense for most organizations, we designed a voluntary separation offer to incentivize employees to resign and accept a severance package combined with continuing health and education benefits—all in an effort to avoid layoffs or salary reductions. When more cuts became necessary, we next turned to a temporary reduction in the university's contribution to the employee 403b retirement plan and cuts in vacation leave accruals. Eventually, we reluctantly concluded that layoffs, salary reductions, or furloughs were necessary. Layoffs became the “least bad” option, as we did not want to further cut back resources or compensation to our faculty and staff who would remain.

Up until this point, our faculty and staff community had supported the decisions made as we had kept them aware of our financial challenges. However, layoffs soon changed that support. Our dilemmas included how to decide which positions to eliminate and how transparent we should be in the decision-making process. We chose to engage the services of a Human Resources consultant to suggest positions to cut, and we consulted only with the supervisors of the affected staff. (We decided against any faculty layoffs.) So when the announcements were made, the Regis community was caught by surprise, and many reacted angrily to both the decisions and what they considered the secretive process for making them.

Even now, several years after these events, I wonder what we could have done differently to address our financial challenges. I recognize that open consultations on who to cut and how to decide would have roiled our community even worse than the eventual reaction to the announcements once they came down; however, we paid a price in lost trust among many in our campus community that has yet to heal fully. I console myself a bit with the knowledge that we worked very hard to make layoffs the last option after we had exhausted all other alternatives—a mission-based response to financial hardship.

Our other challenge in the recession was how to address the many family emergencies that arose in the wake of layoffs and other financial crises among the parents of our students. The initial decisions we made proved to be very successful—putting together a student emergency fund from donations and departmental budget cuts, and creating a committee to set priorities for disbursing the money and making the hard decisions student by student. We also did not publicly advertise this Student Emergency Fund, fearing a “run on the bank,” but chose instead to quietly inform faculty advisors, financial aid staff, counselors, and

campus ministers of its existence so they could refer student cases to us.

However, making the hard choices of whom to assist and whom to deny were not made any easier even with careful management of the process. Initially, we gave priority to those students closest to graduation and who had demonstrated strong academic and personal performance during their time at Regis. In addition, we determined that our financial assistance should be short-term in duration as opposed to long-term scholarship assistance so that we could help the most students.

In spite of these guidelines, we found ourselves struggling to tell first and second year students that they would be better off transferring to a local community college for a period of time for financial reasons, or explaining to families that while their emergency situation might last longer than a year, we would only be able to provide emergency aid for the current semester or academic year. Most difficult of all was telling students or their parents that their poor financial planning meant that college enrollment would need to be postponed until they dealt with more urgent financial problems in their personal lives. Mission decisions in all cases, but painful for those involved.

LIVING WITH CATHOLIC IDENTITY CHALLENGES

Perhaps the most difficult and persistent mission challenge religiously-affiliated organizations face involves balancing the inclusive aspects of mission and identity (e.g., commitments to service, care for the poor), with the doctrinal aspects of the sponsoring religious tradition. In the case of Catholic universities, hospitals and social service agencies, these tensions have grown more acute in recent years as Catholic advocacy groups, local bishops and members of the entities' own trustees, alums, clients or students have called on them to adhere to church orthodox positions even when they conflict with other aspects of their mission values. How should these organizations draw the line between appropriate commitments to Catholic positions and those that threaten their very identities? How are they faithfully Catholic and also faithful to their missions?

The current controversy over the federal Health and Human Services (HHS) mandate that requires many religious employers to offer contraceptive services and prescription coverage as part of their health insurance plans is only the most recent example of this tension, but it illustrates better than most of the issues the dilemmas facing these



organizations, especially for Catholic groups answering the call to live out their faith commitments. As part of the Affordable Care Act, those employers who are clearly part of a religious denomination are exempt from this requirement to provide contraceptive coverage, but this exemption extends only to those who hire exclusively their fellow church members and serve their own fellow religious adherents. So in the case of Catholic entities, the exemption directly applies to parishes, seminaries, dioceses and some schools, while hospitals, universities and social service agencies are considered non-religious for purposes of the law's provisions. In addition to the constitutionally questionable role given to government to decide who is sufficiently religious to qualify for the exemption, the law reinforces a troublesome tendency among some Catholics and fundamentalists to view religiously affiliated organizations as needing to hire and serve others using the same strict guidelines, as well as to emphasize doctrinal teachings, whether or not religious instruction is part of the group's primary purpose.

Like many Catholic groups and the U.S. bishops, Regis has chosen to oppose the HHS Mandate due to this overly narrow definition of what constitutes authentic religious expression. However, in another difficult decision involving our students and their health insurance options, we made a choice some might consider completely counter to official church views. In this instance, Colorado state law added a new requirement requiring all insurance policies offered in the state beginning in 2011 (self-funded plans the exception) to include coverage for contraceptive procedures and treatments, with no exemptions for religious organizations. Because we do not self-fund our student plan, unlike our employee health insurance, this left us with only two options: drop university-sponsored coverage for students or comply with the new law. An important consideration for us was the likelihood that many students who rely on our university health insurance, especially those from low income families, would be unable to find comparable coverage at an affordable price on their own. As an added complication, our students studying for health professions such as pharmacy, physical therapy and

nursing are required by their clinical placement sites to carry health coverage, so dropping our plan could block them from completing their clinical requirements for licensure. After weighing all of these issues, we ultimately decided to continue our health insurance plan for students, a difficult choice that may again confront us and other Catholic organizations depending on the outcome of the HHS Mandate deliberations at the national level.

Similar instances of what might be seen as insufficient mission orthodoxy at Catholic universities can be found in many of our practices. We invite dialogue among differing viewpoints, including those that differ from church positions, we permit students to discuss gay and lesbian perspectives, and we respect academic freedom among our faculty and students. Even as Catholic a university as Notre Dame ran afoul of some fellow Catholics over the abortion issue, not due to the university's own position but because Notre Dame invited President Obama to address the graduating class in 2009. So while Regis honors our Catholic identity in our mission values and commitments, we also honor our identity as a university when we permit an open exchange of ideas on campus, make tough choices about speakers, and recognize the diversity of beliefs and backgrounds within our students, faculty and staff. But balancing these aspects of our mission is often uncomfortable for us, as we struggle to find the right mix of responses that authentically represent our complex institutional values.

LESSONS LEARNED

Some wisdom has emerged from the experience of managing our mission over the years at Regis University. These insights have shaped our approach over the years:

- *Honesty about the complexities and challenges of living out our mission.* No simple reference to our mission documents will answer most of the tensions we face, as these tensions reflect deeply held beliefs and values of our internal community and external stakeholders.
- *Patience.* We need to take the long view that developing a culture of mission in an organization is a

long-term commitment, and recognition that there will inevitably be considerable trial and error in the process.

- *Relationships, relationships, relationships.* Building commitment to an institution's mission needs to be invitational, not mandated (so, no mission police). The process should be characterized by listening, finding out what people are passionate about and then inviting them to participate in ways that respect their insights and talents.
- *Accepting that we cannot meet everyone's expectations around mission values.* For some, an organization like a university can never be "Catholic enough" or otherwise measure up to their demands; for others, any references to foundational religious values can cause an allergic reaction. We have to admit that we can't please everyone, nor should we try. Being faithful to our mission is complex enough.

What is on the horizon for all of us who lead Catholic organizations? Clearly more challenges to living out our organizations' mission values authentically, particularly as changes come to higher education, health care and social services. These changes will continue to re-shape who we serve, how we deliver services, care or education and how we pay our bills. Also clear is the tension we will experience from competing expectations of external constituencies, including government and church entities, clients, patients, students and donors.

Our mission commitments won't resolve these conflicts or tensions, but they should inform our decisions and the way we go about making them, keeping us mindful to act with integrity and respect for our community members. Living our mission matters, and nowhere more so than in the colleagues we invite to live it with us and those we serve, relationship by relationship.



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Becky Urbanski, Ed.D., and Michael Miller, Jr.

Mission Integration in Catholic Healthcare Two Perspectives



Catholic hospitals have long been leaders in addressing the issue of mission vs. margin. HUMAN DEVELOPMENT MAGAZINE asked two experienced health care professionals to reflect on the issue by answering a series of questions. They responded separately in writing to our questions and did not see each other's responses until the article was completed. Their answers have been brought together here by the editors. Our respondents are Becky Urbanski, Ed.D., Senior Vice President for Mission, Marketing and Education at Benedictine Health System in Duluth, Minnesota, and Michael Miller, Jr., Chief Mission Officer at St. Joseph Mercy Hospitals (Trinity Health) in Ann Arbor and Livingston, Michigan.

HUMAN DEVELOPMENT: Describe how the issue of mission and margin is lived within your health system.

Michael Miller: A mentor mission leader likes to use this analogy: Catholic healthcare is a dance between ministry and business. Some days, the business leads and on other days, mission leads. The job of mission leadership is to help make sure there's a good balance between the two.

Becky Urbanski: Like many health care organizations, the Benedictine Health System (BHS) is guided by a mission that calls out a special emphasis on caring for those who are underserved and those in need. Our System has a strong sense of organizational culture shaped around four core values—hospitality, stewardship, respect and justice. As part of our mission integration work, we strive to educate and communicate the importance of the System's mission and core values. Consistently, when surveyed on the topic, over 90% of our 6,000-plus employees understand the system's mission and core values and how their work furthers this mission and the core values.

Miller: At each ministry organization within Trinity Health you can find leaders striving to operate a good business and, at the same time, live up to the expectations of being a ministry. Without financial sustainability, our mission will cease to exist. If we don't take care of the poor and underserved, a vital part of our core identity is lost. The burden of this struggle, however, does not fall on one person alone. It is a shared responsibility supported through our formation efforts.

Urbanski: Stewardship is critical when it comes to the tug of mission versus margin. We need to be thoughtful and deliberate when it comes to all the resources we've been entrusted with and we need to make good decisions whether it means being a part of a new community or discontinuing a service or operation. We also are aware of our responsibility to uphold and contribute to the common good as a part of Catholic social teaching. We do this through our commitment to community benefit. For many years, the Benedictine Health System has participated in the standardized community benefit planning and reporting system developed by the Catholic Health Association (CHA). This model provides us with a systematic method for planning, tracking and recording BHS contributions to the communities we serve. We constantly monitor and make efforts to improve the quality of health care in the communities we serve.

Miller: Formation is a key strategy that Trinity Health uses to navigate the issue of mission and margin. Formation opportunities are provided at all levels of the organization. We have a twelve-month intensive formation program designed for executive leaders across the system. Mission leaders are deployed at each local ministry organization to provide timely, relevant formation to associates, leaders and board members. These mission leaders, trained in theology and embedded in healthcare leadership teams, work to support decision making that reflects our Catholic identity, mission and values.

HUMAN DEVELOPMENT: All of us in ministry leadership wrestle with the pressures of mission and margin in our respective institutions. What do we have to learn from the way that Catholic health care has struggled with this issue?

Urbanski: First, ministry leaders need to remember that each situation is unique. Many times, the concerns of mission versus margin are significant and time-consuming. They merit the thought and effort that goes into considering the issue. One is not more important than the other—it is a cooperative effort and one of give and take and determining right balance.

Ministry leaders might consider following what many Catholic health care ministry leaders often do—turning to those grounding, guiding principles when wrestling with the issues of mission versus margin. That would include reflecting on the mission of the organization's sponsors or founders, what the organization's mission and core values are, how the mission and values are practiced, reviewing the elements of Catholic social teaching and other similar activities. Catholic health care ministries frequently have an ethical decision-making process in place to help with these difficult situations. Using this decision-making model can help avoid conflict and provide consistency and discipline. The model can also help when the decision needs to be communicated as it provides a sound basis and rationale on how the decision was made for the organization.

Elements of an ethical decision-making process can include gathering information, identification of the issue, reviewing the organization's core values and related responsibilities, identifying alternatives, making a decision and then evaluating the decision.

Miller: Wrestling with the pressures of mission and margin is not new! I imagine every Catholic hospital archive contains evidence of this struggle. Here are three suggested learnings from Catholic healthcare.

- 1) Formation is vital. When Trinity Health was founded in May of 2000, two orders of women religious (Sisters of Mercy and Sisters of the Holy Cross) transitioned their sponsorship of health systems to Catholic Health Ministries, a newly created public juridic person. You could say that these sisters "handed over the family store" to us and have entrusted us to continue the ministries they began. To this end, we need leaders who demonstrate business competencies. We also need the same leaders to understand their role in leading a ministry of the Catholic Church.
- 2) This work takes time. The concept of the dual natures of Christ can offer us perspective. In the early church, negotiating the divinity and humanity of Jesus Christ resulted in many heresies that took centuries to resolve. Catholic healthcare is similarly dual natured. It is both fully a business and fully a ministry. We are only beginning to embrace the mysterious realities of operating a hospital as both a business and a ministry.
- 3) Do not be afraid. The industry of healthcare is complex and always changing. Reimbursement models are poised to change; new collaborations with physicians are rapidly forming and many implications of health care reform

remain unclear. Catholic healthcare, like the entire industry, has an uncertain future. It comforts me to remember that our mission and values have brought our ministries to where they are today and can guide us through these turbulent times into the future.

HUMAN DEVELOPMENT: What practices do you have in place to balance the concerns of mission and margin?

Urbanski: At BHS, our strategic planning process grounded in our mission, vision and core values helps us stay focused on what is most important to achieve our goals. This process cascades from the system level down to the unit level at our facilities. We use a web-based tool to help us track progress. Also, our quality and performance improvement processes assist us with keeping operations as efficient and effective as possible. We need to run financially stable organizations within the System that are fully integrated in our mission and core values.

Our governing board is actively engaged in finding answers to the age-old question of how we maintain our Catholic identity and integrity in a challenging economic environment. At BHS, we are currently in the process of discussing key criteria that will help us determine mission versus margin decisions. While still in the early stages of discussion, alignment of mission, vision and core values, sponsorship, strategic fit, business model sustainability and management capacity have all emerged as elements to be considered in regards to mission versus margin issues.

Miller: Along with our formation work described above, the mission discernment process helps us balance the concerns of mission and margin. When leadership is contemplating a significant business initiative (e.g., closing a program, laying off employees, beginning a capital project or expanding into a new area of service), a mission discernment is required.

A mission discernment begins with a conversation among stakeholders—physicians, health system leadership, patients, community members—to view the proposed initiative through the lens of our organizational mission and values. This conversation is then synthesized into a document that is analogous to a market analysis or a financial review. The mission discernment is then submitted to the decision maker/s (CEO, Board of Directors) to ensure that decisions are not made outside the scope of our mission and values.

Mission discernments do not always mean that we will avoid the next round of layoffs. A difficult decision like this may be exactly what the organization needs to ensure long term sustainability. The discernment process is particularly helpful in identifying how this decision may, in fact, reflect our mission and values. This is extremely beneficial as an initiative is implemented and communication plans are developed. If you cannot directly link decision making to the organization's mission and values, balancing mission and margin will become increasingly untenable.

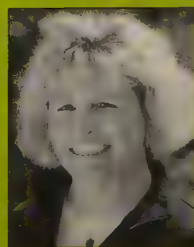
HUMAN DEVELOPMENT: How do you assess whether the leaders in your system have been able to successfully navigate the mission/margin tension?

Urbanski: Obviously, financial performance is one assessment method. Development, implementation and evaluation of the strategic plan is another. Using the results of our comprehensive employee survey process is another method for understanding the tension of mission versus margin. How well we serve our communities through community benefit planning and reporting helps us be good corporate citizens in the communities where our facilities are located.

These are all results and assessments that are important but what is most critical is that all these learnings continue to be integrated to further our mission of caring for those who are in need or who are underserved, as well as for System growth and maturity.

Miller: There are many financial metrics that provide a glimpse into our efforts to navigate between mission/margin tension. Our operating margin and the amount we spend on charity care or community benefit programs for the poor are helpful. If we have a healthy margin, that should indicate a greater ability to serve those in particular need.

But, I believe the best assessment is listening to our associates. By developing good relationships with our front-line leaders and staying in touch with our associates, our success in navigating the mission/margin tension becomes clear. Our associates will let us know when a mistake was made. Every day, they share their experience of our organization with co-workers, family members and neighbors. These are the stories that, for good or ill, define our ministry. While more difficult to calculate than financial metrics, these stories round out our assessment and tell us what numbers cannot. Namely, how we are able to continue the healing ministry of Jesus.



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Michael Miller, Jr., is the Chief Mission Officer for St. Joseph Mercy, Ann Arbor & Livingston Hospitals and Health Centers. He can either be found in the hospital coffee shop, on twitter (@michaelmillerjr) or chasing his two-year-old daughter, Ella.

Mary Elizabeth Kenel, Ph.D.

When the topic for the current issue of HUMAN DEVELOPMENT was announced, I began canvassing sisters I knew in several religious communities. My queries came in the midst of the difficulties the Leadership Conference of Women Religious (LCWR) was experiencing with certain American bishops and their counterparts in Rome. Perhaps it ought not to have surprised me that the responses to my queries were slow in coming and, at times, lacking in specificity.

PERSONNEL ISSUES

Among the common themes that did emerge was that of the difficulties facing the community Mission Leader after surveying the membership and finding it top heavy with aging, ailing members who can no longer accept full time positions or engage in duties that require a fair measure of physical stamina. Many times lack of personnel led to wrenching decisions as to which missions could remain staffed, which were to be turned over to lay persons or another religious community, and which were to be closed. As anyone who has lived through the making and implementing of such painful decisions is aware, emotions frequently run high and range from sadness and anger to a sense of betrayal and

For the Sake Of the Mission Religious



Communities Embrace New Challenges

abandonment on the part of those whose lives and familiar ways of doing things are disrupted. Frequently, too, there is a sense of failure and guilt on the part of the community that is no longer able to provide personnel for a specific mission. This sense of failure has been enhanced, to some extent, by condemnation from ecclesial sources in which blame for lack of new vocations is meted out.

One of the religious communities that did respond to my request for information shared the results of a viability study conducted in 2012 that revealed sobering statistics. At that time, the membership of United States Province of the Daughters of Wisdom was less than one hundred and the median age of the sisters was 78 years. Given no new members and a steady rate of loss of membership through death, it was estimated that within 15 years there would be fewer than 40 members with a median age of 84 years.

While asking themselves what sorts of outreach to potential members might be developed, one issue the sisters identified was that of the age gap between current members and potential new members. As a rule of thumb, a difference of ten years or more between spouses or between the youngest and next youngest person in an organization of any type is considered significant and having the potential to lead to difficulties.

RECRUITMENT AND FORMATION ISSUES

The sisters who participated in the Daughters of Wisdom's viability study identified a need for renewed efforts in terms of vocation promotion and committed themselves to developing a new province-wide formation program that would align ongoing formation with initial formation thus providing new vision and hope as well as continuity in growth for all.

As the United States Province of this community is part of an international religious congregation, consideration was given to the need for cultural formation in order for the sisters to establish themselves as an international

community with a clear mission and a potential vocational outreach to a growing new population here in the United States. Essentially the sisters recognized the need to develop a vocational promotion plan designed to change their current profile to one that is more multicultural in its orientation. An offshoot of this desire for increased cultural diversity among the members was the recognition that local communities would also need to be re-configured for the sake of mission and for the accompaniment of the new members. Increased collaboration with other congregations within the United States and with the branches of their own congregation in other parts of the world in the areas of ongoing and initial formation was also perceived as assisting in meeting the goal of a diverse membership.

GOVERNANCE

Given their dwindling and aging membership, the Daughters of Wisdom also noted the need for changes in government and leadership. Thought was given to merging the provinces of the United States and Canada or to merging all the provinces in North and South America as well as Haiti to form a single Province of the Americas. Other communities have taken similar action, for example, the Daughters of Charity recently consolidated three of their four U.S. provinces in an effort to reduce the number of sisters in provincial administration, thus freeing some for work in other forms of ministry. Consideration was also given to the possibility of electing a provincial administration from among the English-speaking international membership of the community or appointing a lay person to oversee the financial and administrative aspects of the province with assignments and other matters relating to specific sisters continuing to be made by the Provincial Leader who would be an actual member of the religious congregation.

FINANCIAL CONCERNS

Financial constraints were also among the common themes mentioned by the sisters who responded to my

queries as was the stress that results when a religious community is no longer able to fund a particular work. Rather than close a mission completely, many religious communities are assisting these entities in moving toward self-sustainability, teaching those who will continue the work skills such as grant writing and other forms of fund raising and income production. Still, there are those who complain when obliged to make a financial contribution for services that were once freely given and who seem not to grasp that significant societal and economic changes now oblige many elderly religious to seek financial assistance to support themselves in their later years.

Despite financial limitations posed by the current economic climate, a shrinking base from which to obtain funding, and the limited earning power of aging community members, the Daughters of Wisdom indicated they would keep a reserved fund of restricted money to support mission initiatives for the next eight years.

Other sisters spoke of issues that arise when the work in question, particularly provision of health care in a hospital or clinic setting, must contend with moral and ethical pressures that would compromise its Catholic identity. Issues related to birth control, family planning and abortion, adoption by same-sex couples, and end-of-life matters often enough resulted in blocked funding or the siphoning of patients and resources to other institutions willing and able to offer an array of services that, in light of Catholic teaching, one opts not to make available. In at least one instance, it was reported, a religious community was obliged to close a hospital because it could not compete with another local institution that was not bound by the Catholic Church's code of ethics. Although it was a difficult decision, it became evident that selling the facility was to be preferred to *selling out* the Catholic identity of the institution.

Another respondent raised the concern of how the Catholic identity of a particular institution or work is to be maintained if non-revenue producing services, for example, pastoral care or

spiritual formation, are cut much the way art and music courses are dropped from school curricula when the economy contracts. Under such circumstances, she contended, the ability to be *something different* from any other institution is impaired.

EXCESS REAL ESTATE

Some communities who have witnessed shrinkage in the numbers of members have responded creatively to the problems of large buildings that were no longer used to capacity. The Daughters of Charity in Emmitsburg, Maryland, turned a nursing home that previously cared for their own sisters into a facility in which laypersons as well as the sisters could receive care. As one of the provincial councilors noted, the logistics were a nightmare as there were many state and federal regulations that had to be taken into consideration. Another community, the Sisters of St. Joseph of Brentwood, Long Island, transformed the nursing facility that had previously housed and cared for only their community members into an intercommunity setting where women religious from the various communities in the diocese might receive care. The Daughters of Charity also sold an unused wing of what was formerly the headquarters of the Emmitsburg Province to a non-profit organization that, after working with a convoluted set of state and local regulations, re-tooled that portion of the facility into low-income housing for senior citizens.

CAPACITY BUILDING

While mulling over these and similar responses, I was struck by the depressive tone that seemed to permeate many of them, despite the elements of creativity found in some.

My research, however, eventually brought me into contact with the concept of *capacity building*. This term is likely to be familiar to those who work with non-profit agencies, those in the social services, and those engaged in international humanitarian work. Capacity building may be defined in

various ways, depending on the focus of the group. A definition drawn from the realm of non-profit organizations identifies capacity building as actions that enhance a non-profit's effectiveness while other definitions refer to the concept of actions that promote an agency's ability to work toward its mission. In the international arena, capacity building generally refers to teaching local people to do the work now performed at least partly by foreigners. Catholic Relief Services (CRS) defines capacity building as an ongoing process through which individuals, groups, organizations, and societies enhance their ability to identify and meet development challenges. CRS's guiding partnership principles emphasize the importance of building just relationships with local partners and strengthening their skills in such areas as strategic planning, advocacy, organizational management, and project development and management. As I read more about CRS and the concept of capacity building, it struck me that some aspects of the CRS model have already been implemented or could readily be implemented by religious communities.

For example, CRS rarely implements projects directly. Instead, it relies on its unique partnership strategy, working with local organizations with which the agency has forged ongoing relationships based on a shared vision and common values that include mutual respect, cooperation and dedication to fundamental justice. This sort of approach might well suit a religious community whose resources of personnel and money are limited but which could enter into partnership with a diocese or a particular parish to assist in the development of a school, a religious education program or a church-based health clinic. Branching out into the broader society, members of a religious community might link not only with the local church but also with other humanitarian and social action organizations. As organizations within our civil society assume a greater role in the work previously done by women religious in such fields as education and health care, the need to cross boundaries that formerly existed, such as religious/lay or church-sponsored/societal/public

organizations, becomes ever more important.

One group of sisters, The Sisters of Notre Dame de Namur, did just that. They paired their experienced teachers with AmeriCorps volunteers, forming the Notre Dame Mission Volunteers AmeriCorps. Both sides seemed to benefit from the exchange. The sisters were pleased to be able to share the knowledge gleaned during their many years in the classroom as well as the spirit of mission that imbued their work with a group of receptive, eager younger persons who were, in many cases, entering the teaching profession or embarking on a service career.

Other sisters, however, mentioned having mentored one or more employees, thinking he/she/they might take over some facet of the community's work—only to be disappointed. One sister noted the person she groomed to take her place on the ethics/mission effectiveness team sought employment with another agency. Another indicated that her sisters found the spirit or charism that was so important to them in establishing and carrying forward their work for many years seemed to mean little to those who picked up the reins—and, in some cases, was quickly swallowed up by financial concerns, competitiveness and desire for prestige. Despite setbacks such as these, however, the concept of capacity building with its emphasis on collaboration is one that is already in place in many areas and ought to be explored in even greater depth.

FOCUS ON JUSTICE

Another of the fundamental principles of CRS is a *focus on justice*. Here again, one can see the change in the thrust of many of the religious communities, particularly, it would seem, for those who are members of LCWR or who are supporters of a national social justice lobby called Network. In the past, emphasis was often placed on charity, generally understood as giving to those who are poor and unfortunate, weak or ignorant. In doing charity, undoubtedly many religious communities and individual religious sought to model themselves on the criteria

As the sisters of the United States sought to bring their lives more into line with the social teachings of the Catholic Church, in doing so they inspired the laity to follow suit.

offered by Jesus in Matthew's Gospel (25:35-36): For I was hungry and you gave me food, I was thirsty and you gave me something to drink. . . ."

Today, however, there is a renewed appreciation for the virtue of justice and its application to our lives in this time and these circumstances. The Public Religion Research Institute poll released on October 22, 2012, indicated most (60%) of U.S. Catholics favored increased focus on social justice and help for the poor, even if it meant focusing less on issues such as abortion or same-sex marriage. It would appear that groups such as the *Nuns on the Bus* have accurately taken the pulse of American Catholics who are responding to the call for justice that has been nurtured since the time of the Second Vatican Council. As the sisters of the United States sought to bring their lives more into line with the social teachings of the Catholic Church, in doing so they inspired the laity to follow suit. Not that the need to feed the hungry has disappeared, but there is a sense that we must also help those who hunger and thirst for righteousness (Matthew 5:6) to obtain their fill through the exercise of their civil rights, through our support for just laws regarding immigration, through provision for access to education, job opportunities, and health care—not merely through gifts of food, clothing or money.

Social justice, including eco-justice, also loomed large in discussions of specific mission activity and in plans for ongoing formation. The Daughters of Wisdom addressed this issue most thoroughly and noted they already had developed programs that linked their spirituality and charism in an inclusive relationship with social and ecological justice. They asked that further development along these lines take place to move the members to greater unity of life.

VIABILITY OF RELIGIOUS LIFE

Of course, as various sisters noted, reduced membership and little sign of new members on the immediate horizon, issues related to viability of the

community and of religious life in general arose. The topic of ending or shutting down is not limited to religious life. The non-profit sector challenges us to think the unthinkable—to come to the recognition that closing down is not the ultimate disaster but a freeing thing that challenges us as to how to best utilize the human and other resources we have for, as the book of Ecclesiastes (3:1) reminds us: *there is a time for everything under heaven*. As one blogger, Jan Masaoka, noted, a non-profit exists to cure something, address an issue or elevate the status of a group of people. If and when that is achieved, there is a need to recognize death by success—the mission has been accomplished and the victory won.

Looking at religious life in the U.S. through a similar lens, I was reminded of the *Women & Spirit* exhibition that showcased numerous artifacts assembled from more than 400 communities included a handwritten letter from Thomas Jefferson, a cradle from the New York Foundling Hospital, traveling trunks, journals of immigration experiences, pioneering healthcare devices, diaries, samplers, musical instruments, student work and ephemera associated with a number of recognized saints, among them Frances Xavier Cabrini, Katherine Drexel and Elizabeth Seton. The exhibit presented stunning photographs of the sisters' activities, and included an introductory video, oral history listening stations and smaller videos that displayed archival footage. Moving from these depictions of the early lives of women religious in this country, one can see there is a case to be made for saying sincerely, mission accomplished.

Although much work remains, health care and education have been positively influenced in our country through the presence of the Catholic healthcare and school systems whose viability was made possible by the dedicated service of the women religious who staffed these institutions at a time when our country was segregated, when the education of girls and young women was not a priority, when health care for the poor and for those with illnesses such as cancer, polio and Hansen's

disease was limited, when orphanages and services for abandoned children were few and far between. As we read the Synoptic Gospel accounts of the Parable of the Sower, we see the seed that was planted fell upon a variety of soil types—the harvest or lack thereof was not a reflection on the goodness of the seed but on the quality of the soil on to which it was scattered. Thanks to the dedicated women religious who worked and continue to work in our country, we are certain we have been blessed with the gift of good seed—the question now falls to us, what sort of soil are we? Are we willing to follow the lead of the women religious whose sacrifices brought much needed services in the fields of health, education and welfare to our country? Are we willing to work with them in the ongoing struggle for the justice that will lead to the fullness of God's reign?

CONSCIOUS CLOSURE

The non-profit sector, as Jan Masaoka noted, offers guidance that might readily apply to the need for closure of a particular work or of a religious community itself. It has been suggested that closure be framed as an organization-wide project in which everyone has a part to play and as a collective learning process. Periodic check-ins for reflection and connection were recommended to facilitate the organization-wide project. These would afford all members time to attend to the "inner landscape" of their emotions, mindsets, competencies and blockages and allow a variety of voices to be heard and perspectives shared in an effort to align outer actions and the decision-making process while enhancing group cohesion and mutual support as members hold the paradoxes of celebrating accomplishments and grieving losses.

With reference to the learning process, it was recommended that members make conscious the need to foresee and steward endings in the organization, and to listen to what the work and the mission are asking rather than imposing their own wants or expectations on the situation. Ms. Masaoka also noted a need for a shift in the attention of

the leadership toward the practice of collective stewardship, a form of leadership that involved inspiration leading to the development of skills and ways of thinking that would steward transitions and endings while facilitating within the membership the courageous ability to face and accept the natural process of lifecycles as applied to the organization.

LEAVING A LEGACY

In addition to asking themselves hard questions about the viability of their religious communities, sisters also expressed concern with their potential to leave a legacy to those who will come after them. Some communities, such as the Sisters of Notre Dame de Namur, found a creative way to pass along a variety of practical skills through their collaboration with AmeriCorps. Other communities, although few in number of members but financially robust, might consider allocating money or other tangible resources to projects in this country or abroad that are in keeping with the mission and charism of their founders.

Some groups expressed concern regarding the transmission of their spirituality and charism and reported they found an avenue to address their desires through the establishment of Associate Programs. While the programs vary from group to group, in essence they involve offering lay men and women a formation program that includes instruction in the history of the particular community, spiritual formation based on the charism of the community, opportunities for prayer with community members, and opportunities for service related to the mission of the group. At times, the Associates assist in fund raising and in some groups Associates are invited to take part in the governance of the community. Over time, some of the associate groups have demonstrated creativity in sharing their vision of the community, its spirituality and mission with others via Websites and social media.

And so the Spirit continues to blow where it wills, good seed falls upon our ground, and the *Quiet Yeast* (Margaret

Cessna, H.M., *HUMAN DEVELOPMENT*, Fall 2012), the good leaven bequeathed to American Catholics by women religious, continues to be worked into the loaf of church and society by new hands until all is raised. As T.S. Eliot reminded us in his poem *Four Quartets*: "What we call the beginning is often the end. And to make an end is to make a beginning. The end is where we start from."

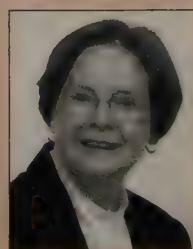
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Rose M. Dowling, F.S.M.

‘Continue Courageously, for the Love of God’

Religious communities face many challenges these days as we seek to live out our deep-rooted call to be faithful to the Gospel, to our mission. Some challenges are obvious. Others are less obvious and perhaps go deeper, touching the very core of our existence. Such challenges might include finding others to care for the elders among our communities or evaluating the feasibility of retaining the convent or monastery in which we have been living for decades, even centuries. Some might call us to evaluate the effectiveness of our ministry amid changing times. Some might even call into question the very purpose of our existence.

This kind of challenge calls forth a variety of responses. If we pay close attention, such a response is rarely a one-time response. If we are faithful, we make a discerned response, taking the next step in the process, and then the next, again and again until we finally relax into the response to which the Spirit is calling us. That response then turns the key that allows us to know we are “home,” that this is the place from which we are being asked to move forward . . . even if “forward” looks rather peculiar, given our decision. We find ourselves in a place from which most of us would not expect to start . . . a place that allows us the opportunity to look into the mirror at the possibility of our own death—chosen freely and with integrity.

The Franciscan Sisters of Mary (FSM) were faced with just such a choice. It was not an easy decision—nor did it happen quickly. But through discernment over years, we determined that we were called to redirect our focus, our energy, on revitalizing ourselves as Franciscan Sisters of Mary. If new members came, we would welcome them—but we would no longer actively recruit them.

How did our discernment lead us to such a decision?

A REALITY CHECK

Discernment begins with information. When we made this decision back in 2001, we began our consideration with the fact that, since 1979, no one had joined our congregation and stayed. For twenty-two years, we had gained no new members. (At the time of our 2001 Chapter, we had 178 sisters. In 2005 we did have one woman who had left us for 25 years re-enter the congregation; she remains with us today.)

We faced other facts as well: The generation gap between our sisters and prospective members was becoming wider and wider. And our energy for and commitment to recruiting new members were dwindling as our average age increased. How relevant was our community lifestyle to the young women we would hope to be recruiting?

For the previous twenty years, since 1981, we had spent a fair amount of effort addressing areas related to vocation recruitment in attempts to attract women to our congregation. Many other congregations were attempting some of these initiatives as well, with varying degrees of success. Some of these initiatives included:

- Updating statements of philosophy, policy, procedures, evaluation tools, program goals, objectives and content covering recruitment, admission, postulancy and novitiate;
- Asking local communities to include recruiting new members as a community goal;
- Having members of the formation team visit other local communities of women religious to exchange information and skills and to explore vocation awareness;
- Setting up formal preparation for vocation ministry; and
- Collaborating with other congregations to promote and foster vocations.

In 1999 we engaged in the LCWR Viability Study, *A Critical Juncture*. All members of the Franciscan Sisters of Mary were involved in this study. We identified the following concerns:

- Implications of the lack of new membership;
- The eventual future closing of our motherhouse, St. Mary of the Angels Convent; and
- Time and geographic distances that militated against deepening relationships within the congregation.

At that time the congregation's leadership team put before us "the need to explore the demands and responsibilities that are ours if we choose to recruit new members or if we choose to make meaning without new members."

Reflecting on these concerns led us to begin to understand that, without new members, with the looming potential loss of our motherhouse, and with the realization that some of our relationships were not all we would want them to be, we were facing some serious work. These challenges confronted us with the reality that our core being as Franciscan Sisters of Mary was being touched and we were being nudged to look squarely at ourselves, without blinders, without masks.

We responded to that nudge. We recognized that the issues we were facing were much broader than new membership—we were being called to consider the viability of the congregation itself.

A WATERSHED TIME

We brought our discernment to our Pre-Chapter meetings in 2000. During these meetings we agreed upon five areas we would pursue as the issues for our FSM 2001 Chapter. One of these areas was new membership.

In February 2001, just prior to the Chapter, each sister was asked to share her reflections on this topic with the Chapter members by completing a survey on the topic of new members. Among other questions on the survey, sisters were asked: "Shall we put more effort into attracting new members? If yes, what will we be inviting them to?" and "Shall we decide not to take new members? If so, what then?" The sisters' responses were sent on to the Chapter.

During the April 2001 Chapter, the question of membership came up very frequently because it was not easy for Chapter members to open themselves to the possibilities that issue raised. More than once, time was given for Chapter Members to go off alone, to pray with a discerning attitude in order to see where they stood.

Finally, the following four positions emerged:

1. We will not take new members.
2. We will not exert more energy into attracting new members.
3. We will redirect our focus, our energy, on revitalization; if new members come, we will deal with that issue when it arises.
4. We will exert more energy in attracting new members.

Chapter members were given time for individual reflection so each could identify where she stood on the issue given these possible positions, and why she held her particular position.

Upon reconvening, members grouped themselves according to their position on the issue. Each shared her reasons and considered the implications of the group's position in six years from that time. The members in the four groups then further considered: "Are there any alternatives or options open to us, given the position we have taken?"

The four groups reported their findings to the entire assembly. Once more, members were given reflection time to consider the four positions, taking into consideration the new information that had been shared. One by one, each sister shared her thinking.

Initially, the vast majority of Chapter members had chosen position 4: "We will exert more energy in attracting new members."

As we continued our conversations, however, we recognized that the goal of revitalizing the congregation—rather than recruiting new members—was our true objective. We were deeply aware of the mission we had—to be the presence of the loving, serving, compassionate, healing Jesus—and our call to carry it out. We were also deeply aware that times had changed, and that these new times demanded that we be creative and explore new paths, new options. We wanted to focus on pursuing our mission, on living out our faithfulness to the Gospel. In order to be open to revitalization, we needed to accept that we couldn't put most of our energy into simply recruiting new members.

We were beginning to understand that "success" for our congregation wasn't a "numbers game." In the end we recognized that we needed to move on, to address the other issues our Chapter was facing, issues that were at the heart of our religious life: mission, quality and depth of relationships, and spirituality.

A NEW VISION

So the decision was made: We would redirect our focus, our energy, on revitalization. If new members came, we would welcome them and deal with the process of formation at that time.

Part of that decision meant that we would no longer have a formalized recruiting program.

Over the years we continue to have inquiries from time to time from women who are interested in exploring religious life. We have a sister who responds to every single inquiry we receive. She shares honestly with each one of them, explaining who we are at this time in our congregational life and exploring with them the fit between their possible call to religious life and where that might fit with us. We have always been—and still are—open to the miracle!

But we have also turned our attention to many other significant parts of our lives. We have pursued and continue to pursue the spectrum of revitalization.

We have directed our energies into exploring new horizons. In our 2007 Chapter we opened ourselves to questioning some of the “givens” of our congregation—for instance, holding on to a motherhouse that no longer fulfilled our sisters’ needs. In our 2011 Chapter, we unanimously chose a focus, flowing from our congregation’s mission, of compassionate care of creation in collaboration with others. While we are still in the early stages of moving our focus forward, we have opened ourselves to caring for God’s creation in new and imaginative ways.

For the most part, I would describe us as at peace with this decision.

The decision does call into question the congregation’s present and future. Why are we here? We are here to live out the Gospel, not attend to our own survival. We have no more sure way to live . . . this is the way Jesus lived. I think we only came to this realization in any depth when we were faced with this “life or death” choice—that to move forward in faith may result in losing a way of life we deeply cherished.

Sometimes people are faced with a choice in life—to spend time trying to make sure we “survive,” or to face reality as it is and truly *live* the moment we have right here, right now. And at the same time to be open to and ready for the miracle!

LIVING THE MIRACLE THAT IS

We have experienced many miracles since we made that decision back in 2001. So far it hasn’t included the miracle of women entering our congregation. But we see what has been happening to us over these past thirteen years as miracles in our congregational life.

Some of these miracles include:

- The freedom to deal with our own revitalization—a gift we longed for as we witnessed in the buildup to our 2001 Chapter;
- The desire to explore and to live what being in mission means for us at this time in our lives;
- The deepening belief in and commitment to religious life as it

continues to evolve;

- Building our sisterhood;
- Learning that letting go is transformative and brings us to places we could never have imagined—and so many, many other blessings!

Over these past thirteen years we have seen more clearly that how we live our mission as Gospel women may not be inspiring the women we once wished would join us. But we are able to pass on our Gospel presence to those with whom and to whom we have ministered. We have learned to be creative as we pass on our sponsored ministries—a health care system involving more than twenty hospitals, a birthing center, a center for abused women, a home for teenage mothers, hospice centers, and many other ministries—to our lay sisters and brothers.

We have let go of our beloved St. Mary of the Angels Convent, and now more than half of us live in a retirement residence built by five congregations of religious sisters. The letting-go process was transformative for every one of us, whether we lived at the convent or not. The process took more than two years, with many of us involved in the ten Transition Teams we formed to complete the process. The transition built our relationships with one another and for many took those relationships to a much deeper level than ever before. It also nudged us into creating ways to be present to our employees at the convent as we said good-bye to them.

It has challenged us to find ways in our new environment to bring the Good News to a place where we are not in charge, where we live next door to Mr. and Mrs. Smith, or Mr. Jones or Ms. Wells—not Sr. Mary or Sr. Laura.

We continue to update our spirituality—to find fresh ways to approach God and listen to the whisperings of the Holy Spirit. We often share reflections with one another, articles and books we have read that we find inspiring and insightful. Because we were hospital sisters for so many years, over the years most of us hadn’t kept up as much as we might have wanted with all that was happening in theology and spirituality. Now we are hungry for those topics—and we are gifted with the time to pursue them. As we do this, we build relationships among ourselves and create structures

that allow each of us to participate as fully as is possible, depending on our level of energy, in the activities and intentions of the congregation.

We continue to live in the mystery that has always been religious life but that in our own times seems to be even more a mystery. We wonder, *How can a lifestyle that is so alive as it is now apparently be dying at the same time?* I’m certainly not going to attempt to answer this question here.

But I would say that in the mystery of it all for us, the Franciscan Sisters of Mary, our mission, our life together, our fidelity to the Gospel has not suffered because of that decision we made in April 2001. If anything, that decision set us on a journey to discover in greater depth the Gospel of Jesus for our times and awakened in us an awareness of how we live that Gospel for the sake of all creation today.

The final recorded words of our foundress, Mother Mary Odilia Berger, are “Continue courageously, for the love of God.” I believe we were courageous in 2001 when we made the choice we made. And I believe we continue to be courageous today as we pursue the journey of transformation to which that choice led us. The journey of this tiny group of 97 members as it chooses to revitalize itself affects the whole world. Nothing that is for good is wasted in the transformation of the world. That insight is at the core of the Gospel message.



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The Ignatian Goal

Saint Ignatius opens his manual of graded exercises—his thirty-day workout of prayer—with a condensed statement of the basics. He gives us the boilerplate of the Christian life in the “Principle and Foundation,” a rather bald text that is so familiar.

We are created to praise, reverence and serve God Our Lord, and by so doing to save our soul. The other things on the face of the earth are created for us to help us pursue the end for which we are created. It follows from this that we must use created things insofar as they help towards our end, and free ourselves from them insofar as they are obstacles. To do this we need to make ourselves indifferent to all created things.

The text goes on, as we know, to explain and exemplify “indifference.” “We should not want health more than illness, wealth more than poverty, etc.” The marriage vows are always brought to mind by this wording.

Saint Robert Bellarmine paraphrases the above in his treatise *On the Ascent of the Mind to God*. His version appears in the breviary reading for his feast, September 17.

If you are wise, know that you have been created for the glory of God and your own eternal salvation. This is your goal; this is the center of your life; this is the treasure of your heart. If you reach this goal, you will find happiness. If you fail to reach it, you will find misery.

May you consider truly good whatever leads to your goal and truly evil whatever makes you fall away from it. Prosperity and adversity, wealth and poverty, health and sickness, honors and humiliations, life and death, in the mind of the wise man, are not to be sought for their own sake, nor avoided for their own sake.

Bellarmino’s version seems more limber and applicable, less matter of fact. But we go back to the bare bones of Ignatius always. The “Principle and Foundation” serves as an overture to the Spiritual Exercises. Our major experience of such an overture is with the “Prologue” of the evangelist Saint John. John begins his gospel by establishing clearly the pre-existence of the Word as well as the central event in salvation history, “the Word was made flesh and dwelt among us.”

Think of an opera overture—to “The Barber of Seville” by Rossini, for example, or “The Bartered Bride” by Smetana. These are played so often on classic music stations that we tend to identify the opera with them. They not only introduce, they also sum up the themes of the opera to follow. This is true for the heavier operas, Wagner, for instance, or light opera, such as Gilbert and Sullivan’s *Mikado*.

From the “Principle and Foundation,” the concept of our purpose, our goal to be kept in mind, goes out like an arrow through the Spiritual Exercises. The periods of prayer are never allowed to become theological reflections of a general sort. They are instead always about me; that is, about me and God, me gradually coming out of myself toward the Trinitarian God. The Exercises are about choice, the crucial importance of choice, the unhampered exercise of free will. In the very last breath of these thirty days, the retreatant is urged to pray, “Take, Lord, and receive all my liberty, my memory, my understanding, and my entire will, all that I have and possess.” This is not any abandonment of free will; it is a total activation of the free will in a gift of ourselves, to be responsive to God’s love.

Each exercise in this long process depends upon what the Holy Spirit is doing with us, leading us to. The Exercises abet our increasing familiarity with the work of the Holy Spirit—our sharpness too in discerning when some other spirit is at work

Line

James Torrens, S.J.

upon us. From the start the exercitant is attuned to receptivity, yet, in the "Principle and Foundation," the role of the Spirit is kept implicit. The focus is rather on that curious term and attitude, "indifference."

The word "indifference" does not mean, in the current sense, that we are not to care about "created things." Ignatius surely does not intend the kind of listless attitude conveyed in the slang expression "Whatever," along with a shrug. Rather we are told not to have any type of care that is resistant to God drawing us or coaxing us in a direction that does not suit our pleasure, that will cost us something. "Teach us to care and not to care" says T. S. Eliot in his purgatorial poem, "Ash Wednesday." No one has put it better.

My poem, "Purpose," is unabashedly a meditation on the "Principle and Foundation." Please God that it not be too far off the Ignatian mark.



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Purpose

**I am inscribed with purpose.
When first they weighed me in
and handed me around to dandle,
It was there to read:
praise, revere, serve.**

**Wonderfully made,
creation catering to me
but weak-eyed as I was,
how could I not misread:
be praised, indulged, served?**

**Ah my poor body, wedging in
among elbows, and o my soul
now learning your ABCs,
hearken to what alone saves—
awe, blessing, commitment.**

**Let the Great Breath fill you
like a sail, with minimum drag,
and as Another pleases impel you
over unforeseen ways
into the beatific clasp.**

LEADERSHIP TODAY:

A Way of Purification

Mary Ellen Dougherty, S.S.N.D.

Experiences of elected leaders in religious congregations are as varied as the leaders themselves. And yet the professional issues that leaders encounter have some generic likenesses. Among those issues are: institutional integrity while dealing with the church and the world today; mission and ministry matters including decisions about sponsorship and the future of sponsored works; community life and related matters, from definition to logistics; general retirement issues, especially healthcare for sick and elderly members. These are weighty issues which touch on the here and now of the lives of members and on the future of the congregation. They require of leaders intelligence and balance, capacity for close focus and, at the same time, perspective.





The ministry history of each person needs to be honored both for what it is in itself and for the residual riches it has provided over the years.

Significant and “big picture” as these matters are, they are only part of the daily activities of leaders. Leaders must be able to move with ease and with speed from the concrete minutiae of the mundane to the elusive intangibles of mystery. On any given day they can go from a budget meeting to a deathbed—all within the course of an hour. This rapid movement across diverse activity calls not only for personal flexibility but also for emotional and intellectual agility. Leaders cannot be “single issue” (or single skill) persons. It is their responsibility to work the parts in the context of the whole. Able to “do” detail, they would be wise not to mistake detail for direction.

While leaders develop a wider view of the congregation than they probably had in a differently-focused ministry, they also bring with them all the experiences of previous ministries. The ministry history of each person needs to be honored both for what it is in itself and for the residual riches it has provided over the years. Most persons come into leadership within religious congregations equipped with an impressive array of experiential wisdom. This wisdom, coupled with openness to new wisdom, provides fertile ground for effective leadership. At the same time, the role of leadership within a congregation provides a unique ministerial opportunity for fulfillment through service.

The role of leaders is to dream and in consultation with others to envision and to plan and to implement. Leaders are generally in a position to make things happen, whether directly or through effective delegation of authority. In this way they can usually increase the probability of excellence and, at the same time, build unity. Wise and wide inclusion of both members and associated laity is essential to the credibility (and probably the quality) of both the process and the product.

With deeply pastoral hearts, leaders have the privilege and the responsibility of encountering and accompanying a diverse range of members in times of joy and pain. They can encourage and occasionally even nudge others, when appropriate, toward decisions that, if inevitable, can nevertheless be liberat-

ing. In addition to being a listening heart to other members, they can also give voice to the collective voice they hear through individuals. Through their pastoral work with members, leaders are deepened in compassion and insight. They remain learners.

And to all of this, each leader takes herself. “The leader herself” is the focus of these reflections.

THE LEADER HERSELF

First of all, a fundamental difference between leadership within a congregation and other leadership roles is that the leader is also a member of the congregation that she leads. She has generally come from a local community within her geographic area of governance in which she held some authority, and will, in all probability, return to ordinary membership within that area. She is working always with and for her own. This can heighten in her the sense of responsibility as well as the stress she experiences from time to time. It can also call into question within her the degree of objectivity out of which she acts and reacts. While her work in leadership is not necessarily more demanding of her time and energy than some of her previous ministries, it can be more personal and therefore more draining. The central reality, the fact that she is always functioning on behalf of and under the scrutiny of “family,” is simply an unalterable truth. While she is not governed by this, a wise leader remembers it. Rather than the lens through which she consciously views her ministry, it is often the quiet and intuitive undercurrent that carries her.

In a book called *After Ecstasy, the Laundry: How the Heart Grows Wise on the Spiritual Path* (2000) Zen master Jack Kornfield, speaks of the process of moving from emptiness to fulfillment, and then to enlightenment with the inevitable return to emptiness. For Christian mystics this process is analogous to the Dark Night. It is a process that might also be thought of as movement from *mysticism to the marketplace*.

There is no doubt that the leader in a religious congregation today is in the marketplace. The needs of her congregation mandate steady attention to matters both large and small. She is by necessity a "doer." She generally must travel a great deal, be present at and to many meetings; interact and negotiate with colleagues on the council as well as key staff, with clergy and with laity; she is called upon to write, to think, to speak on demand and at all times to be attentively present to people. And always there is "the laundry," those daily administrative tasks that must be attended to. While each person's definition of laundry will differ, depending on taste and aptitude, there are generally those tasks attached to any ministry that are routine and boring, albeit necessary. Fortunately, these ordinary tasks can usually be seen in the context of a larger reality.

Often the collective effect of ecstasy and laundry together is energizing. Stimulating the mind and the heart, the ministry of leadership can be a source of personal satisfaction. The results often provide concrete evidence that, as a leader, she has been able to contribute significantly to a larger communal cause.

At the same time, she seldom has the time or inner stillness to sustain the contemplative heart that she has learned must be the ground out of which she acts. Although she may give regular time to prayer, she too often takes to it a noisy spirit. Her experience of prayer and thus perhaps of God seems to have changed, or, more disturbingly, to have disappeared. If she has been in this place before, she can trust more easily that God is, even in this land of nowhere, present.

Nevertheless, she is often either driven or drained by activity. She can justify this by the facts of her busy life or she can lament the disconnect. She will probably do both. And in so doing, in becoming aware of the inner dissonance she is experiencing with increasing frequency and intensity, in coming face to face with herself, she will come to the heart of the matter, that within herself all is not finished, that effective leadership demands a





willingness to be purified. As Cassius said to Brutus in Shakespeare's *Julius Caesar*, "The fault, dear Brutus, is not in our stars, but in ourselves." For the leader who is willing and able to listen to her own heart and to the voices of others, service in a leadership position within one's congregation will facilitate self-knowledge in ways that can be stark and uncompromising. To own this, to deal with it without being preoccupied by it, is, indeed, a delicate balance.

THE CALL TO INNER SURRENDER

This realization, that within her all is not finished, that effective leadership demands a willingness to be purified, again and again—this realization calls for a new level of self-knowledge as well as a new level of commitment. It calls for honesty. It calls for a letting go of resistance to what is. Ultimately, it calls for inner surrender to grace and to God. Humbling, this realization can also be quite liberating. It is part of the cycle that leads to equanimity and it needs to be attended to.

It will be attended to differently by each person. For some, more experienced in the interaction between the heart and God, it will simply be a part of the rhythm of the spiritual life. That does not mean that it will be inconsequential to them; it simply means that they will not be surprised by what feels like failure or emptiness. For others it can be initially devastating. What matters is the ability and the willingness to acknowledge it as a call to conversion.

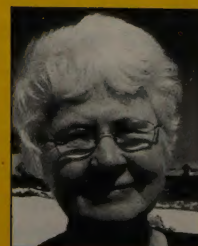
The first order of business in attending to the matter of ongoing purification is awareness. While the level of busyness and her daily investment in her work will not change, she will, in the midst of it, be aware of the long view: she will know in a new way who she is, where she is going and why. She will remember that what she is about is not about her. Nor will she want it to be about her. She will also move with greater ease from ecstasy to laundry.

In practicing awareness, she will grow in her ability to see things as they are, and in her ability to name them thus. She will grow in clarity. She will be able to cut through her own dynamics as well

as the dynamics of others, coming to the truth with increasing alacrity, painful as the truth may be at times. She will know and accept that it is what it is. She will know, again, what she is about and why.

In essence, she will begin to live out of an honest simplicity.

And thus she will grow in inner freedom, enabling her to serve more freely and more humbly. For that is what genuine leadership is, service that is free and humble. Smart, yes; informed, yes; visionary, yes; dedicated and hard-working, yes. But in the end, free and humble.



Sister Mary Ellen Dougherty, S.S.N.D., currently on sabbatical, served from 2008 to 2012 on the leadership council of the School Sisters of Notre Dame, the Atlantic-Midwest province.